the Forward
Knowledge worth forwarding . . .
h&h hooker & holcombe

Happy Anniversary!

Our firm opened for business on ***May 5, 1956***, under the name Russell O. Hooker, Consulting Actuary.

Sixty years later, as Hooker & Holcombe, we are a leader in providing actuarial, retirement and investment consulting expertise to retirement plan sponsors and their participants.

Read more about the life and careers of our founders.

Hooker and Holcombe Enhances Consulting Depth

We are proud to announce two former employees have rejoined our team.

Kathryn "Kate" Pizzi has rejoined the firm as a consultant within the investment advisory group. She has more than 16 years of experience serving the actuarial and investment advisory needs of both public and private clients. She will be responsible for managing client relationships in addition to projects within the sales, research and management areas. **Read full bio>**

Steve Lemanski has rejoined the firm as consulting actuary. He has 27 years of experience providing actuarial consulting services to diverse clients. He will be responsible for a wide range of projects including, consulting on qualified & nonqualified defined benefit and postretirement welfare plans, performing pension valuations, benefit calculations, cost estimates and reporting for GASB and FASB. **Read full bio>**

"Now that the DOL has issued the final version of the "fiduciary rule," read more about what it really means for the investment industry ."

- John Fuller, Vice President, Director of Operations
Investment Advisory

401(k) Fiduciary Rule Fallout: What it Means For Advisors.

Last week, Secretary of the Department of Labor Thomas Perez released the final version of the long awaited "fiduciary rule" as it applies to any professional who is advising clients on retirement assets. **Read more>**

"Learn more about the IRS deadline for retirement plan documents and how it may effect your processes."

- Barry Bonetti, Managing Director, Client Services
Retirement Services

IRS Offers New Correction for Missed Plan Restatements.

The Internal Revenue Service (IRS) is reminding plan sponsors that April 30 is the deadline for those using preapproved retirement plan documents to sign an updated version of their 401(k) profit-sharing or other defined contribution (DC) retirement plans. **Read more>**

"An interesting article on the future of investment behavior and outlooks."

- Kathryn Pizzi, Consultant
Investment Advisory

The Futurist: Institutional Investing in 10 Years.

When Chief Investment Officer asked me, resident futurist in the CIO family, to predict the future of beneficial investing 10 years on, my first thought was to list the new-fangled investments that will be found in asset owners' portfolios. **Read more>**

"Read more about this growing trend among employers regarding pension risk."

- Ronald Schlee, Vice President, Consulting Actuary
Actuarial and Benefits Consulting

Pension Risk Transfers Topped $14 Billion Last Year.

With five separate companies reporting buy-out sales above $1 billion, group annuity risk transfer sales increased a very solid 54% in 2015, totaling $14.4 billion, according to LIMRA Secure Retirement Institute's U.S. Quarterly Group Annuity Risk Transfer Survey. **Read more>**

A look back in time...April 1956

Celebrating the past.

Envisioning the future.

- Famous soap operas "As the World Turns" and "Edge of Night" premiere on TV
- Diary of Anne Frank wins at the 10th Tony Awards
- Heavyweight champion, Rocky Marciano, retires undefeated
- U.S. actress Grace Kelly marries Monaco's Prince Rainier III
- Clarence Beaumont, 1st batter in 1st World Series, dies at 75
- 1st solar powered radios go on sale
- Stanley Cup Playoffs - Montreal Canadians beat Detroit Red Wings

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About Us

As — Actuarial Services

Ia — Investment Advisory

Rs — Retirement Services

Wm — Wealth Management

Kc — Knowledge Center

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