the Forward

Knowledge worth forwarding . . .

hooker & holcombe

Luckily, you don't need to be a mutual fund expert to understand the different share classes. Here's a brief primer to help you understand the basics. **Learn more>**

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IRS Issues Publication 575, Pension and Annuity Income, for 2018 Reporting

The IRS has posted on its website an updated version of Publication 575, "Pension and Annuity Income," for reporting concerning 2018. **Read more>**

Financial Perspectives on Aging and Retirement Across the Generations

The Society of Actuaries' Aging and Retirement Strategic Research Program is pleased to release the results of a study focused on the financial perspectives of aging and retirement of Americans across five generations, including Millennials, Gen X, Early Boomers, Late Boomers and the Silent Generation. In addition, the study seeks to understand how the habits and behaviors from earlier in life played out in the later years of retirement.
Read more>

IRS Updates Information About Adopting Pre-Approved Plan Documents

New FAQs offer information about when retirement plan sponsors can adopt pre-approved plans and when determination letters are issued. **Read more>**

US Investment Grade Credit: A Buy or a Bubble?

Recent market stress surrounding trade policy, the US government shutdown, Brexit and recession fears has increased focus on the US investment grade credit market and its sharp rise in leverage in the post-crisis period. Invesco Fixed Income believes these concerns are best analyzed through the lens of the BBB-rated portion of the US investment grade bond market. **Read more>**

Plan Sponsors Ask...

Pensionmark provides answers to some recent plan sponsor questions. See if it's something you've been wondering about. **Read more>**

Surprising Target-Date Fund Findings from 2018

Assets in target-date-funds grew again in 2018, although growth was somewhat muted thanks to the fourth-quarter market downturn. **Read more>**

5 Ways to Check if Your Automatic Rollover Program Needs an Upgrade

The long-awaited Department of Labor guidance on the legal and regulatory framework for auto-portability has cleared the way for plan sponsors to further enhance and optimize their automatic rollover programs.
Read more>

Stretch Match Could Lead to Lower DC Plan Deferral Rates

Studies have shown an employer matching contribution is a motivator for employees to save in their defined contribution (DC) plans, and many choose a deferral level that maximizes their matching contributions.
Read more>

Unlocking Participant Behavior a Key to Retirement Security

There are many pieces to the puzzle that is retirement security. And one of them, suggests a benefits institute, is the behavior of plan participants. **Read more>**

Newsworthy Notes

Active in our community:
Richard Sych, president and consulting actuary, has been elected to the Actuarial Advisory Board of the University of Saint Joseph.

We are moving!
After more than four decades of successful growth in West Hartford, we are retiring from our location at 65 LaSalle Road. As of April 1st, our new location will be 1300 Hall Boulevard, Suite 1C, Bloomfield, CT 06002. Our phone numbers and email will remain the same.

We are proud to support these upcoming events:

- The Ferguson Library's 'A Novel Affair" on April 11
- Foodshare's 'Walk Against Hunger' on April 27
- The City of Middletown's Annual 'Mayor's Ball' on April 27