



Our 2020 Municipal Pension & OPEB Report brings the pieces together!

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heroes!

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We would like to thank all of our frontline heroes for putting themselves in harm's way to keep others safe. We appreciate all you do!

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Pandemic creates pension plan tension: Take the lump sum or trust lifetime payments

One of the risks that comes with pension plans may be looming larger than usual. As many companies work to regain their financial footing in the midst of continuing economic uncertainty caused by the coronavirus pandemic, a retiring worker's decision to take either a lump sum or lifetime payments from their pension could boil down to one factor: whether they think the employer will be able to meet its long-term commitments. [Read more](#)

DOL Issues Final Rule on Electronic Delivery for Retirement Plan Documents

Retirement benefits have entered the digital age — thanks to a new ruling by the Department of Labor allowing private-sector employers to share more plan information online. [Read more](#)

PBGC IG Report Highlights Application of Technology, Anti-Fraud Effort

The Office of the Inspector General of the Pension Benefit Guaranty Corporation (PBGC) has issued its semiannual report to Congress. The report covers a wide range of PBGC activities, and places special emphasis on applications of technology and efforts against fraud. [Read more](#)

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The Next Evolution in 403(b) Plans: Investments

While 403(b) plans have made great strides, lifting restrictions on the types of investments the plans can offer and considering more diverse investment types could further improve participant retirement outcomes. [Read more](#)

Guiding Your Retirement Plan Through a Recession

A recession creates an array of challenges for an employer, and among them are its effects on a retirement plan. A May 28 Plan Sponsor Council of America (PSCA) webinar examined what an employer and plan participants should look for and consider regarding the plan and the recovery of the economy. [Read more](#)

DOL Issues Guidance About Private Equity Investments in DC Plans

An Information Letter addresses private equity investments as a component of a professionally managed asset allocation fund and outlines what plan fiduciaries should consider. [Read more>](#)



How Identity Fraud Targets 401k Participants

'During the next twelve months, criminals will strike at the heart of the financial services industry' . [Read more>](#)

How Can 401k Plan Sponsors Make Employees Aware of Age-Based Social Security Risk

On May 28, 2020, the Penn Wharton Budget Model (PWBM) released its report titled “ The Impact of the Coronavirus Pandemic on Social Security’s Finances.” Its summary offered this warning. [Read more>](#)

Form 5500 Deadline Still Looms: Be Ready

Some Form 5500 filers received relief in April, but not all. And the July 31 Form 5500 deadline looms for calendar-year plans—pandemic or no pandemic. [Read more>](#)



Newsworthy Notes

New hires

We are pleased to announce that **Natalie Morris** has joined the firm as service center analyst in our Support Services Center, and that **Sarah Adams**, pension calculation analyst, **Theo French**, actuarial specialist, and **Rebecca Lunt**, actuarial associate, have joined the firm's Actuarial Services Group.

We are proud to support the following organizations:

- Wheeler Clinic
- American School for the Deaf
- Hartford Marathon Foundation's UCONN Health virtual marathon

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