



The elements of success



hooker & holcombe

# Burlington Employees' Retirement System (BERS)

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Modernizing your pension plan administration



# Meet your presenters



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**Marc Condon, FSA, MAAA**

Pension Administration Consultant

- Over 28 years of experience providing retirement services to defined benefit plan sponsors
- Responsible for ensuring seamless participant data management, benefit calculations and retirement payment processing through the web-based portal
- In addition to pension administration, expertise includes funding and accounting valuations, plan design consulting, cost projections, benefit certifications and experience studies

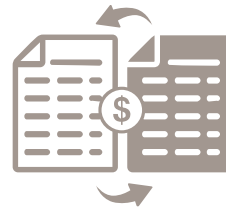


**Cathleen Falconer**

Team Leader and Actuarial Specialist

- **Implementation lead for Pension Outsourcing services**
- Over 20 years experience in the retirement services industry
- In-depth actuarial expertise with Qualified and Non-Qualified Plans

## Pension Outsourcing Program



## PensionEdge® Plus

- Maximum flexibility for busy plan sponsors
- Supported by knowledgeable service center representatives
- Driven by PensionEdge® Plus online technology
- Comprehensive solution that meets your needs
- Web-based portal providing a single source of data
- No hardware or software to purchase
- Real-time reports
- Online newsfeed and communications
- WorkTrack, an online “assistant” to maximize plan sponsor efficiency
- Integrated valuation data
- Online user guides and on-site training
- Paperless documents
- State-of-the-art security

## ► PensionEdge<sup>®</sup> Service Center provides prompt answers and assistance to both plan sponsors and their participants




### PensionEdge<sup>®</sup> Service Center

- Answer participant questions via call center and email
- Maintain audit trail of verbal and written participant correspondence
- Assist with website navigation and completion of election forms



### Benefit payment services

- Interface directly with payor of benefits
- Process ongoing benefit payment maintenance (i.e., withholding, address, delivery changes)
- Reconcile monthly benefit payment activity
- Take action on death audit reporting



### Forms processing and auditing

- Manage benefit election process from initiation to payment
- Audit of returned benefit election forms
- Communicate with participants to achieve good-order forms

## ► Staffed with experienced pension plan specialists with in-depth knowledge of your plan:

- Average tenure of 12 years
- Certifications include Series 6 license and ASPPA Defined Benefit Administration Certification
- Lead representative assigned to your plan



The elements of success

Together we will

- ▶ **identify** your challenges and opportunities
- ▶ **achieve** your goals
- ▶ **exceed** your expectations

<https://hhconsultants.com/bers.aspx>