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*Pension Fund Evaluations, Inc. (PFE) is an independent full service Investment Consulting and Commission Recapture firm, that also provides Third Party Administration and Record keeping services through alliances, dedicated to servicing Taft Hartley, Corporate, Endowment, Foundation, 401 (k), 403(b), 457, and Municipal Plans. Registered with [FINRA](#) and [SIPC](#).*

## Industry Insights

New Disclosure rules take effect during 2012. The new regulations under ERISA section 408(b)(2) and Section 404(a)(5) make significant changes to the fee disclosure requirements to be made at both the plan sponsor and plan participant levels. The new regulations also require all plan service providers to furnish more detailed information about their fees, services and expenses.

Is your plan ready for these changes? PFE can help get your plan into compliance today. Call 631-585-8282 or email [rnicholsen@pfeval.com](mailto:rnicholsen@pfeval.com) to set up an appointment with one of our Investment Consultants.

## Industry Conferences and Seminars

## Announcements

October 2014 Pension Fund Evaluations, Inc. is please to announce that Westchester Correction Officers (COBA) has retained its services for full service Investment Consulting.

May 1 2014 Pension Fund Evaluations, Inc. is pleased to announce that Santa Monica UNITE HERE Health Benefit Fund has retained its services for full service Investment Consulting.

May 2013 : Pension Fund Evaluations, Inc. is please to announce that it has been retained by the Suffolk County Court Officers Supplemental Health Plan to provide analysis and recommendations on its current investment portfolio.

January 2013: Pension Fund Evaluations, Inc. is pleased to announce that we have been hired by the Board of Trustees of the Santa Monica UNITE HERE Health Benefit Trust Fund to provide an analysis and recommendations on its current investment portfolio

February 2013: Pension Fund Evaluaitons, Inc. is please to announce that we have been hired by the Board of Trustees of IBEW Local 490 Pension Fund to provide full service investment consulting services

January 2012: PFE is proud to announce that we have become members of the New Jersey Alliance for Action organization. [www.allianceforaction.com](http://www.allianceforaction.com).

September 2011: PFE is pleased to announce that it has been retained by Maniilaq Association to develop a comprehensive Investment Policy Statement for its retirement plan. (For over 30 years, Maniilaq Association has provided health, tribal, and social services to residents of rural northwest Alaska).

## About Us

- Investment Consulting
- Performance Monitoring for Investment Managers/Mutual Funds
- Plan Administration
- Investment Policy Creation and/or Review
- Asset Allocation & Investment Manager Searches
- Complete Record Keeping Services
- Plan Sponsor and Participant Level State of the Art Reporting and Online Services
- Benchmark Creation Analysis
- Commission Recapture
- Trade Execution Analysis

CNBC

Dow Jones

P&I Online

NY Times

Morningstar