

## **Penbridge Advisors teams with Institutional Investor Journals to expand distribution of Defined Benefit Expense Survey**

*Results of survey will be used to compile DB Expense Benchmarks Reports*

STAMFORD, CT, December 11, 2014 — Penbridge Advisors, in cooperation with Institutional Investor Journals, is conducting the first industrywide survey of the costs associated with maintaining a U.S. corporate defined benefit (DB) plan. The survey is to be completed by plan sponsors only.

Pension plan expense data collected from corporate plan sponsors via the Defined Benefit Expense Survey will be used to compile the [Penbridge DB Expense Benchmarks Reports](#), scheduled to be available in early 2015. The initial fielding period for the survey (originally scheduled to end on December 31) has been extended to January 31, 2015.

For the first time, plan sponsors and fiduciaries will be able to compare their U.S. DB plan expenses versus a benchmark group of similar plans for each of the expense categories as well as for the total plan. Expense categories captured in the Benchmarks Reports will include Trust and Custody, Administration, Actuarial, Investment Management and Advisory, PBGC Premiums, Legal, Audit and Insurance.

Respondents to the survey during the initial fielding period will receive, at no charge, a customized DB Expense Benchmarks Report for each plan on which they submit information. To participate in the survey, plan sponsors are asked to fill out a registration form at [www.penbridgeadvisors.com/DB\\_Expense\\_Survey\\_Registration](http://www.penbridgeadvisors.com/DB_Expense_Survey_Registration). Compiled results will be published, but plan-specific responses will remain completely confidential.

### **For more information**

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### **About Institutional Investor Journals**

Institutional Investor Journals are quarterly publications offering in-depth, original and practical research in global investment and finance with an extensive online archive.

Each Journal is written and edited by leading practitioners and academics and is read by finance industry professionals. Each Journal provides current analyses and strategic insights that translate into implementable ideas for global investment management professionals.

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**About Penbridge Advisors**

Penbridge Advisors is an independent advisory firm that provides pension risk transfer (PRT) information and services designed to improve de-risking outcomes for corporate defined benefit plans. Penbridge's advisory services include executive education and strategic pension de-risking analysis to help plan sponsors decide on de-risking strategy and timing. In addition to working with plan sponsors directly, Penbridge partners with select advisory firms to provide integrated PRT analytics, services and solutions. Penbridge provides free access to the industry's only PRT database, currently used by more than 300 plan sponsors and advisory firms.

To access the Penbridge PRT Database, please visit [www.penbridgeadvisors.com/join](http://www.penbridgeadvisors.com/join)