Your NFP PEP Partners

A Pooled Plan Provider (PPP) is required to run a PEP. Under a PEP, the role of the named fiduciary, ERISA named plan administrator and the party responsible for all plan administrative duties, are transferred from the employer to the PPP. Pentegra serves as the PPP for the NFP PEP.

As PPP, Pentegra has partnered with Empower to outsource recordkeeping services for the Plan and NFP to deliver investment management and investment fiduciary oversight for the Plan.

Our combined teams are here to support you every step of the way. It's the peace of mind that comes from having a team of professionals on board.

NFP PEP Partners & Responsibilities

PENTEGRA	EMPOWER	NFP
Pooled Plan Provider & 3(16) Fiduciary Administrator	**Plan recordkeeping, asset custody, plan and participant web services**	**Investment Management & Investment Fiduciary Oversight**
✔ Plan administrator and Named fiduciary for the NFP PEP responsible for all plan administrative duties ✔ Plan governance and oversight ✔ Plan administrative responsibilities, including plan compliance testing, Form 5500 and Government filings, certain plan administrative services and plan document services	✔ Plan recordkeeping ✔ Plan payroll and data collection ✔ Website portals for participants and plan sponsors ✔ Trust and custody	✔ Plan investment selection, monitoring management and oversight of plan investment options ✔ Investment Fiduciary Oversight

PENTEGRA

Your Pentegra NFP PEP Team

Pentegra offers a deep bench of resources to support the NFP PEP.

At Pentegra, our reputation for excellence attracts top industry professionals. The average tenure of our client-facing team members is 15+ years, and more than 60% hold an advanced degree and/or industry credentials. You'll work with a dedicated team of knowledgeable and seasoned professionals with a deep understanding of the NFP PEP.

Who to Contact at Pentegra

Sales Support	Plan Conversion & Onboarding	Relationship Management	3(16) Fiduciary Administration & Support
✔ Sales support ✔ Lead qualification and review ✔ Sales plans ✔ Proposals	✔ Plan conversion and onboarding process ✔ Prior plan document ✔ Collection service agreements	✔ Overall relationship management of your program ✔ Legislative and technical updates and assistance ✔ Plan corrections	✔ Plan operational oversight and compliance ✔ Plan audit support ✔ Plan design & amendments ✔ Annual plan review
View Pentegra's Sales Team Territory Map  Territory Map	**Lisa Marie DeBiase** **Client Onboarding Specialist** lisamarie.debiase@pentegra.com 203-926-3002 **Debra Durso** **Client Transition Manager** debra.durso@pentegra.com 914-821-9571 **Andrew Saba** **Client Transition Manager** andrew.saba@pentegra.com 914-607-6824	**Jared Ferrell** **Relationship Manager** Jared.ferrell@pentegra.com 914-821-9430	**James Hill** **3(16) Account Manager** James.hill@pentegra.com 614-655-5035 **Jennifer Moore** **3(16) Senior Account Manager** Jennifer.Moore@Pentegra.com 614-655-5034