

PENTEGRA at a Glance

Who We Are

Pentegra is a leading provider of retirement plan and fiduciary outsourcing solutions to clients nationwide. With every opportunity, our goal is to create retirement plans that run with less risk, greater efficiencies, and improved outcomes.

A Fiduciary First



We are committed to a higher standard of care for an unmatched level of expertise and oversight.

A Higher Level of Responsibility



As a fiduciary, we provide expert oversight and in-depth knowledge, shouldering much of the work and legal responsibility for managing a retirement plan.

Eight Decades of Expertise



We were founded some 80 years ago as a Named Plan Fiduciary, long before the role formally existed under ERISA.

Compliance confidence



Clients enjoy the confidence that comes from uncompromised and objective oversight and the peace of mind a professional on board provides.

RETIREMENT PLANS we manage	PLAN DESIGNS we support	FIDUCIARY ROLES we perform	PLAN SERVICES we offer
<p>Defined Benefit Plans, including traditional Pension Plans, Cash Balance Plans and Other Hybrid arrangements</p> <p>Defined Contribution Plans, including 401(k), 403(b) and Profit Sharing Plans</p> 	<p>Single Employer Plans</p> <p>Multiple Employer Plans (MEPs)</p> <p>Pooled Employer Plans (PEPs)</p> <p>Association Retirement Plans</p> 	<p>Named Fiduciary</p> <p>3(16) Fiduciary Administrator</p> <p>3(38) Investment Fiduciary</p> 	<p>Third Party Administrator (TPA) Services</p> <p>Plan Design Consulting</p> <p>Plan Correction Consulting</p> <p>Regulatory & Technical Consulting</p> <p>Plan Benchmarking & Competitive Positioning</p> <p>Actuarial Consulting</p> <p>Institutional Investment Consulting</p> 

A Legacy Built Serving as a Fiduciary



We fix what others fear. With our extensive experience as a fiduciary, Pentegra can identify issues that often elude others. As a CEFEX-Certified TPA, we hold ourselves and the work we do to the highest standard. We regularly review plans and often identify issues with prior plan administration that need to be corrected for plans to remain compliant. We're skilled at finding plan issues before they become problems—collectively having saved clients hundreds of thousands of dollars in fines and penalties.

A Trusted Plan Partner



We work in partnership with plan sponsors and trusted advisors, or at the enterprise level, with recordkeepers, trustees and investment management firms, who have already formed a relationship with the plan sponsor.

Experienced professionals



Our reputation for excellence attracts top industry professionals. This means you work with a dedicated team of knowledgeable and seasoned professionals who develop a deep understanding of your company and your plan.

An Independent Perspective



We always put your best interests first and avoid conflicts of interest at all costs. Administering your retirement plan is our priority.

CEFEX Certified for a Higher Standard of Care



Pentegra is one of an elite group of CEFEX certified Third Party Administrators, demonstrating a standard of excellence, industry best practices and elevated governance and oversight.

Flexible and Scalable



Our retirement plan and fiduciary solutions are flexible and scalable for every opportunity. Our services can be added on to existing plan relationships without disruption.

Client driven is in our DNA



We were founded by our clients, and today are governed by a Board of Directors comprised of our clients.

Contact a Pentegra representative today at solutions@pentegra.com or 855-549-6689

www.pentegra.com

<https://316fiduciaryday.com/>

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