

The Pentegra Advantage

Leverage Our Expertise to Create a PEP for Your Opportunity



Where are you with your PEP strategy?

For advisors, Pooled Employer Plans (PEPs) offer a powerful opportunity—driving new business growth, delivering stronger client outcomes, and simplifying retirement plan management. But success with PEPs requires the right partner. Pentegra is that partner. With 80+ years of fiduciary expertise, demonstrated experience in Multiple Employer Plans (MEPs) and PEPs, and industry-recognized fiduciary certifications, Pentegra offers advisors a true strategic advantage—helping you enhance client value, streamline plan management, reduce fiduciary risk, and scale your practice with confidence.



A Strategic Advantage for Advisors

- Differentiate your practice with a proven PEP partner who helps you deliver innovation and scale to clients
- Save time and reduce complexity—Pentegra’s fiduciary oversight, administration, and compliance support allow you to focus on client growth
- Strengthen client relationships with a turnkey retirement plan solution that minimizes risk and enhances outcomes
- Gain a trusted partner—Pentegra works alongside advisors to uncover opportunities and provide consultative, sales, and marketing support
- Deliver high touch service with a dedicated relationship manager to ensure every client receives personalized attention, guidance, and responsive support



Unmatched Fiduciary Expertise

- Among the oldest and most experienced fiduciary providers, with more than eight decades of expertise managing retirement plan responsibilities
- Recognized MEP and PEP experts, bringing decades of experience from administering one of the nation's oldest MEPs
- Independent fiduciary oversight reduces conflicts of interest, ensuring unbiased decision-making in the best interest of participants



Trusted, CEFEX Certified Excellence

- CEFEX-Certified for our 3(16) fiduciary services and Pooled Plan Provider services—demonstrating adherence to fiduciary standards
- Independent third-party certification provides advisors and clients with confidence in Pentegra's governance, oversight, and operational rigor



Operational Strength and Scale

- Full-service infrastructure for onboarding, plan administration, compliance testing, and audit support
- Advanced technology to streamline operations, enhance transparency, and improve accuracy
- Cost efficiencies achieved through pooled structures, benefiting both employers and participants

Pentegra is more than a PEP provider—we are your strategic partner—combining unmatched PEP capabilities with a high-touch advisor partnership, creating a true strategic advantage for your practice. We help advisors unlock opportunities, deepen client relationships, and grow their business.

Contact a Pentegra PEP expert today.
solutions@pentegra.com
855-549-6689

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