

# Unlock New Retirement Plan Opportunities with PEPs



## Position yourself as a strategic partner with Pentegra

The SECURE Act opened the door for new retirement plan opportunities through Pooled Employer Plans (PEPs)—giving unrelated employers the ability to participate in a single, streamlined 401(k) arrangement. For advisors, this creates a significant opportunity: helping advisors bring scalable, efficient, and cost-effective retirement benefits to their clients.

## Why PEPs Matter for Your Practice

- Consolidate your retirement business into one PEP
- Reduce fiduciary and administrative burdens
- Offer high-quality investment options and management—at better price points
- Gain scale and efficiencies across your book of business

For your clients, PEPs can help transform offering a retirement plans from a compliance obligation into a strategic advantage—strengthening their benefits offering to attract, retain and reward employees.

## Pentegra – Your Partner in Designing a Strategic PEP Solution

Pentegra can work with you to design a turnkey PEP solution that works for your practice, helping simplify the complex, reduce risk, and unlock new opportunities.

## The Benefit of Proven Expertise and Strong Industry Partnerships

With more than 80 years of fiduciary and retirement plan expertise, Pentegra is one of the industry's most experienced Multiple Employer Plan (MEP) providers—a foundation that uniquely positions us to deliver exceptional PEP solutions. As a CEFEX certified Pooled Plan Provider (PPP) and administrative fiduciary, we ensure your clients receive the highest standard of governance and support.

Through existing relationships with leading recordkeepers and payroll providers, we offer unmatched flexibility to assemble the right team of trusted partners—creating a complete, seamless PEP experience that drives stronger outcomes for you and your clients.



## Pentegra's PEP Model: Opening Doors to New Opportunities

Our innovative PEP solutions make it possible for businesses of any size to deliver a 401(k) retirement plan—without the administrative burdens of a traditional standalone plan.

By introducing Pentegra's PEP solution to your clients, you can:

- Add tangible value with innovative benefit strategies
- Differentiate your practice with specialized expertise
- Drive stronger client relationships and new business growth

Pentegra's PEP solutions reduce retirement plan responsibilities for you and your clients and add an extra layer of fiduciary oversight, due diligence, and compliance—strengthening your value proposition and client relationships.

Pentegra helps you keep the focus where it belongs—on growing your business—while providing clients with a seamless, cost-effective retirement solution.

**Reach out today for more information about a PEP opportunity with Pentegra.  
Contact the Pentegra Solutions Center at [solutions@pentegra.com](mailto:solutions@pentegra.com) or 855-549-6689.**

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