

Characteristics of Good Candidates for Pooled Employer Plan (PEP)

- Employers with stretched resources that have a need to offload work
- Employers who are risk adverse with a desire to outsource responsibilities and limit liability
- Smaller to mid-size employers seeking bundled comprehensive retirement plan services
- Employers who have limited retirement plan knowledge or experience
- Employers with more than 100 participants looking to eliminate cost and time involved with independent plan audits