Introducing an Easy and Affordable Retirement Solution

Discover the benefits of a Workplace Benefits Advised Pooled Employer Plan (PEP)

A PEP is a defined contribution plan that's like a traditional retirement plan but enables employers of all sizes to join together for potential efficiency and cost savings.

Three reasons to consider a PEP:



Time savings

The PPP handles much of the administration - including eligibility, beneficiary tracking, and plan disbursements.



Risk reduction

The pooled plan provider (PPP) handles most of the fiduciary duties, allowing employers to offload many of the complex aspects of running a retirement plan.



Cost efficiencies

Costs can be spread across a larger participant and asset base, typically reducing the costs for each employer in the plan. Participating employers may also have more access to institutional class mutual funds.

Workplace Benefits Advised Pooled Employer Plan fee schedule*

Recordkeeping, Administration		Trust and Custody		3(38) Advisor Fees	
Per Participant	$60	Percentage of Assets	0.03%	Annual Advisory Fees	customized
Per Adopting Employer	$3,950				

*Other administrative, compliance, participant, and transactional fees may apply. For more information, contact an Ascensus pooled plan specialist at pooledplanproposals@ascensus.com.

Making an informed PEP decision

When evaluating pooled employer plan options for your business, it is important to understand that not all PEPs are the same.

The Workplace Benefits Advised Pooled Employer Plan is designed to help you and your employees achieve financial security. This solution is backed by specialized knowledge in retirement plan administration and leading-edge technology to simplify management, with a dedicated client-first approach.

Because our business is helping you grow yours

To learn more or request a proposal, contact our pooled retirement plan specialists.

800-345-6363 ascensus.com
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