

Pooled Employer Plans (PEP) & The Future



COURSE SUMMARY

Join us for a session exploring the future of 401(k) plan management and the growing role of Pooled Employer Plans (PEPs). We'll discuss how employers view the challenges of managing 401(k) plans and how PEPs can help reduce fiduciary risk, streamline administration, and lower costs.

Participants will earn 1.0 CPE credit

Field of Study: Specialized Knowledge

PARTICIPANTS WILL:

- Develop foundational knowledge of Pooled Employer Plans (PEPs)
- Compare differences between single-employer plans & PEPs
- Determine when PEPs may be appropriate for 401(k) plan fiduciaries

REGISTER:

www.unitedasset.com/continuing-education

Questions? Contact Marisa Smith
at marisas@unitedasset.com

Prerequisites:

Basic knowledge of corporate retirement plans & fiduciary responsibilities

Who Should Attend:

Professionals with Business Owner, C-Suite, HR Management, Director clients; professionals interested in learning about PEPs

Advanced Preparation:

None required

Program Level:

Intermediate

Delivery Method:

Group

No course fee; refunds not applicable. For concerns, and/or program cancellation policies please contact Robert Murphy at 516.222.0021.