



Updates and deadlines for financial advisors

How Financial Advisors Can Leverage the Pooled Employer Plan

The Pooled Employer Plan (PEP) makes 401(k) plans more accessible to every size and type of business. By offering it as a retirement plan option, you may be able to increase your client base and enhance your relationship with existing clients.

- Features of the PEP:
 - o Complete, cost-effective, turnkey retirement solution
 - o Reduces administrative burden
 - o Minimizes fiduciary responsibility

Learn more about how the PEP can help you and your firm increase your assets under management with our [PEP Toolkit for Financial Advisors](#).

Contact your regional wholesaler to learn more

Wholesale401k@paychex.com

[Regional Wholesaler Map](#)

855-588-4775

Resource Corner

Compliance Reminders:

- **August 15:** Deadline for Q2 participant statements
- **September 1:** Startup plan safe harbor notices
- **September:** Schedule client annual plan reviews
- **October 1:** Safe harbor 401(k) launch deadline

State Mandated Retirement

- Many states are requiring employers to offer retirement savings programs. What’s happening in your clients’ states? Visit our [online resource](#) for state-mandated retirement.

Small Plans. Big Opportunities

- View our [webinar](#) to learn more about how these plans could be the future of retirement.