



Expanding Your Advisory Role with PEPs

Pooled Employer Plans (PEPs) are more popular than ever. To give you an example, Paychex *alone* has 34,000+ adopting employers with more than \$1 billion in PEP assets. With so many businesses getting in on the PEP explosion, advisors have new opportunities to capitalize on these easy-to-manage 401(k) plans.

A stubborn myth persists among financial professionals that PEPs will diminish their role. In reality, many advisors are finding that when used strategically, PEPs can help expand their consultative capabilities. To find out how, check out our ebook, [Leveraging the Pooled Employer Plan to Grow Your Book of Business](#).

Switch to a PEP. Lose the audit.

One aspect of a PEP that’s particularly attractive to clients? When they merge their existing 401(k) into a pooled plan, the annual audit and Form 5500 filing are the responsibility of the administrator of the PEP. This can save clients time, paperwork, money, and the headaches of worrying about IRS compliance. To share all the benefits with your clients, click here for a [PEP merger cheat sheet](#).

Resource Corner

Compliance Calendar:

March 17:

- Return of Excess (ROE) Distributions for Failed ADP/ACP Tests
- Tax Filing/Deductible Contribution – Partnerships and S-Corps

March 31:

- RS Form 1099-R – IRS (Electronic Filing)

April 1:

- Required Minimum Distribution (RMD) Required Beginning Date Deadline

April 15:

- Return of Excess (ROE) Distributions - Section 402(g) Annual Contribution Limit
- Tax Filing/ Deductible Contribution Deadline - Sole Proprietorships & C-Corps
- **For more details**, download the [2025 Retirement Compliance calendar](#).



Win with Paychex at the 2025 NAPA 401(k) Summit!

Paychex is a Diamond Sponsor again this year. Get in on the action at **Paychex Booth 314**.



Small business job growth remains stable through February. The Paychex Small Business

Employment Watch provides small business wage and employment trends on a national, state, and industry basis.

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