

What is a pooled employer plan (PEP)?



A PEP is a retirement plan through an organization like Equitable in partnership with Capital Financial Group and Virginia Maritime Association so unrelated employers can benefit from a retirement plan with greater resources and benefits than having a single plan on their own.

What does the PEP sign-up process look like? It's easy as 1, 2, 3.

- 1 Evaluation**
Reach out to James Blessingham or John Cavanaugh.
Contact information below.
- 2 Submit your information**
Provide the requested information for your evaluation.
- 3 Schedule a meeting**
Schedule a no-cost fee and investment analysis and a plan design evaluation meeting.

What's in it for me?

New and existing members of the Virginia Maritime can provide a powerful retirement plan for their employees.

Reduce paperwork and your fiduciary risk.

Eliminate many tasks, such as payroll submissions, 5500 filings and audits.

Administrative tasks are handled by a professional service team, giving you more time to manage your business.

We are here to offer you a choice for your retirement plans. Contact us today to learn more about how a PEP might be right for your business.

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