



Research Insights:

Five ways top advisors increase PEP adoption

Advisors who sponsor a pooled employer plan know they need several employers – some say five to eight – to join the PEP to maximize efficiencies. In recent research,¹ successful advisors weighed in on how they drive PEP adoption.

1. Have a conversation with every client. Outline the pros and cons of PEPs, but do not push the solution.
2. Talk to internal wealth advisors and other retirement plan advisors about your PEP. Encourage them to talk with their clients or take you along to discuss this unique retirement plan vehicle.
3. Become a PEP thought leader. Talk about PEP design and trends at industry conferences (e.g., Dental Leadership Summit), employee benefits organization (e.g., SHRM) meetings and local business association (e.g., Chamber of Commerce) events.
4. Host webinars or in-person events with key contacts in your network (e.g., payroll and banking partners, employee benefit specialists, health brokers). Invite clients and prospects to learn about the growing PEP trend.
5. After your existing clients are successfully onboarded, check their LinkedIn profile for contacts where you believe PEPs would be a good fit – ask your clients for warm introductions.

The Standard can help you develop PEP sales strategies. Contact us to learn more.

¹ About the Research: Sixty-four financial advisors participated in surveys and interviews, collected by a third-party research firm, WinMore Plans, June – Sept. 2025, on behalf of The Standard. Advisors were asked to name a charity in lieu of compensation for participating. Twenty-five non-profit organizations received a cash donation. Full methodological details are available on request.

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