



Pooled Employer Retirement Plans

SMALL BUSINESS
Association of MICHIGAN
Focusing the power of small business.



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SBAM Pooled Employer Retirement Plan

We've brought together industry leaders you can trust!

Learn more by contacting us at (800) 362-5461 or sbam.org/retirement

Provides cost and time savings while reducing your risk.

SBAM understands what small businesses dislike about 401(k) plans – the cost, the time and really not understanding their fiduciary responsibilities.

The SBAM Pooled Employer Retirement Plan powered by TAG Resources, Transamerica, and Graystone Consulting solves the challenges small businesses face when offering a retirement plan.

The SBAM PEP is cost effective and outsources administration and liability. Program pricing is inclusive of 3(16) and 3(38) fiduciary services. Some features and benefits include:

- Administrative relief, as the PPP and 3(16) plan administrator oversee the majority of day-to-day tasks.
- Access to participant communications and plan support.
- Reduced liability, as fiduciary support and responsibility is assumed by professional plan administrators.
- Time savings for organizations by offloading many of these tasks.
- Support with investment selections and performance oversight.
- Ability for adopting employer to retain many of their customized plan features.
- Potential cost savings compared to operating a single employer plan.

Visit www.sbam.org/retirement or call us at (800) 362-5461 for more information including a proposal.