



Taking A Deep Dive Into Pooled Employer Plans

Executives From SageView, Perigon And American TCS Share Views On This Relatively Recent Retirement Plan Option

Third Week of June, 2025, Sander Ressler



... To promote retirement savings access among small employers, PEPs were designed to help them overcome three common hurdles: access, administration and fiduciary risk, according to Victor Hicks II, Wealth Advisor and Managing Director of advisor-led, independent wealth

management firm Perigon Wealth Management.

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