



# WTIA 401(k)

Pooled Employer Plan (PEP)





# About the WTIA

## Overview

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WTIA is a Washington State trade association that serves technology and professional employer groups.

## Mission

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Help employers serve their employees.

## Value Prop

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We consolidate the power of member companies to offer programs and services that they could not negotiate alone.

# Who the program best serves

- » Tech or professional service employers with more than 25 employees
- » Tech or professional service employers subject to annual 401(k) audit
- » Tech or professional service employers who want to do a Safe Harbor Match





# Why the PEP?

- » One pricing structure
- » Base plan design with flexible options
- » Member governance board that oversees performance and serves as fiduciary
- » Diverse investment options
- » Investment advice for participants
- » We do audit, 5500, and compliance reporting

# Our Partners



## Record Keeper and Third-party Administrator

NWPS manages investments, tracks participant accounts, offers a web based platform for employer administrators and employees, and provides tier 1 customer support. In addition, NWPS also performs compliance testing, maintains plan documents, and prepares the 5500.



## 3(38)

SCS Retirement selects, and monitors funds, and assumes investment liability for the PEP. They are a fiduciary to the PEP.



## PEP Manager

WTIA is responsible for managing the performance of the program. Primary duties include developing products, plan design, pricing, and growing participation in the MEP.

# Fund Line Up

## Investment Types

- » Actively managed funds
- » Index funds
- » Target date funds
- » Socially responsible fund

## Investment Managers

- » Vanguard
- » Calvert
- » Oppenheimer
- » Putnam
- » T. Rowe Price
- » American
- » Metropolitan West
- » Victory









# How the process works

1

Meet with WTIA representatives to assess fit.

2

Get a quote.

3

Design and set up your 401(k) plan.

4

Enroll and learn.



 WTIA

The logo for WTIA, featuring a stylized signal tower icon on the left and the letters 'WTIA' in a thin, outlined font to its right.