

Program Overview

The 401(k) is a national pooled employer plan (PEP) that serves technology and professional employer groups participating in technology trade associations.

Who the program best serves

- » Tech or professional services employers of all sizes
- » Tech or professional services employers subject to annual 401(k) audit
- » Employers who want to do a Safe Harbor Match
- » Employers who want a simple, no-cost set-up
- » Employers who want a dedicated service team of HR professionals and administrators

Why the PEP?

- » One pricing structure
- » Simple 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

How the process works



401(k) PEP Fund Line Up

Fund Types

- » Actively managed funds
- » Index funds
- » Target date funds through Vanguard

Financial Institutions Represented in Fund Line Up

- » Vanguard
- » Fidelity
- » Schwab
- » T. Rowe Price
- » American
- » Metropolitan West
- » Victory
- » Oppenheimer
- » MFS
- » Calvert

Contact Us

 401k@washingtontechnology.org

 1595 NW Gilman Blvd Suite 6B
Issaquah, WA 98027

 To learn more:
401ktechcollective.org

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 PEP.