

# **CBIZ Launches CBIZ Retirement Advantage PEP (Pooled Employer Plan) to Help Middle-Market Businesses Attract, Retain and Reward Talent by Simplifying Retirement Plan Administration and Enhancing Employee Benefits**

July 23, 2026

CLEVELAND, July 23, 2026 (GLOBE NEWSWIRE) -- **July 23, 2026** – CBIZ, Inc. (NYSE: CBZ), a leading national professional services advisor, today announced it has launched the CBIZ Retirement Advantage PEP, a retirement solution designed to help middle-market businesses simplify retirement plan administration, reduce fiduciary burdens and provide employees with a competitive workplace savings benefit.

The CBIZ PEP delivers the level of oversight and discipline typically associated with large-plan providers, adapted for growing middle-market organizations. Unlike providers focused solely on retirement plan administration, CBIZ combines retirement consulting with a broad suite of employee benefits, insurance, payroll and advisory services, allowing clients to address workforce needs through an integrated approach.

Employers continue to face growing complexity associated with retirement plan governance, compliance requirements and fiduciary oversight. The CBIZ Pooled Employer Plan enables participating businesses to leverage a single retirement plan structure while outsourcing many administrative and fiduciary responsibilities to experienced providers.

"Managing a retirement plan has become increasingly complex. Employers are expected to navigate evolving regulations, oversee investments, manage vendors, and absorb fiduciary risk, all while controlling costs," said Paula Lewis, Senior Vice President, Third Party Administration Operations for CBIZ. "A PEP lets multiple employers share one professionally managed 401(k) plan, greatly reducing administrative burden and fiduciary responsibility."

Participating in CBIZ's new PEP offers employers the following benefits:

- Reduced administrative complexity
- Professional fiduciary oversight
- Streamlined compliance and reporting
- Access to institutional-quality retirement services
- A competitive employee benefit that supports recruitment and retention

To learn more about CBIZ Retirement Advantage PEP, visit: [Retirement Advantage PEP | CBIZ](#).

## **About CBIZ**

CBIZ, Inc. (NYSE: CBZ) is a leading professional services advisor to middle-market businesses nationwide. With industry knowledge and expertise in accounting, tax, advisory, benefits, insurance, and technology, CBIZ delivers actionable insights to help clients anticipate what is next and discover new ways to accelerate growth. CBIZ has more than 9,500 team members across 23 major markets coast to coast. For more information, visit [www.cbiz.com](http://www.cbiz.com).

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