

Employee Benefit Plans

↳ Customized Audit & Consulting Solutions for Financial Institutions

In a competitive job market, employee benefit plans give you a distinct edge in the quest for quality team members. If you don't have a benefit plan or yours isn't performing well, KPM can help you design a custom plan or improve your existing one. We also audit a range of plans, including defined benefit and contribution plans, Employee Stock Ownership Plans, and health and welfare plans. Our consultants can assist with IRS and Department of Labor (DOL) compliance, third-party administration, and investment strategies.

▶ AUDIT & CONSULTING SOLUTIONS FOR:

- Defined Benefit Plans
- Defined Contribution Plans: 401(k) & 403(b) Plans
- Employee Stock Ownership Plans
- Health & Welfare Plans

COMMITMENT TO QUALITY

We're committed to providing the highest quality of service, which is demonstrated through our membership in the American Institute of CPAs' (AICPA) Employee Benefit Plan Audit Quality Center (EBPAQC).

Our team receives annual continuing education as required by EBPAQC to remain current on all the latest audit techniques, ERISA topics, DOL requirements, and other pertinent plan-related issues.

↳ MEMBER OF THE AICPA EBPAQC



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ADDITIONAL SERVICES

In addition to traditional benefit plan services, our team provides:



- ▶ Audit & Assurance
- ▶ Compliance Guidance & Testing
- ▶ Fiduciary Responsibilities
- ▶ Reporting Compliance
- ▶ IRS Form 5500 Preparation & Review
- ▶ IRS & DOL Assistance
- ▶ Plan Design & Long-Term Planning
- ▶ Preparing & Updating Plan Documents

KPM
CPAS & ADVISORS

   **Let's Connect**

Contact Us Today To Speak With Our Advisors