

DELIVERING PEACE OF MIND



“To show our commitment to our clients, we have a partner who is 100% dedicated to employee benefit plan audits.

We audit over 70 plans annually, and help plan sponsors manage the complex rules, regulations, and increasing scrutiny from the U.S. Department of Labor and IRS.”

Why selection of an auditor is important?

Plan administrators and plan sponsors have many fiduciary responsibilities. The selection of a qualified auditor is one of them. You need a quality audit in accordance with Employee Retirement Income Security Act of 1974 (ERISA) and U.S. Department of Labor (DOL) requirements to help you carry out your legal responsibility to file a complete and accurate annual return and report for your plan each year. Selection of an experienced and reliable auditor is very important because an incomplete, inadequate, or untimely audit report may result in penalties being assessed against you as the plan’s administrator.

Our experience includes:

To show our commitment to clients, we have a partner that is 100% dedicated to employee benefit plan audits. We audit more than 70 employee benefit plans annually and provide services to a wide variety of plans from those sponsored by privately-held companies with 100 participants to large plans sponsored by publicly-traded companies with more than 30,000 participants. We have audited plan assets from less than \$500,000 to more than \$1 billion and are a member of the AICPA Employee Benefit Plan Audit Quality Center.

Why Calvetti Ferguson?

We take a proactive approach to the service we provide our clients. We invest our time in getting to know you and your plan’s operations by meeting with you and attending plan committee meetings. As a result, potential issues are identified and resolved before they become critical and lead to plan operational errors.