



# SingerLewak

Accountants & Consultants



## PENSION AND BENEFIT PLANS

A Client Service Group by SingerLewak

Our team helps you navigate the technical and compliance needs of various employee benefit plans, including 401(k), defined benefit, ESOP, 403(b), health & welfare, and multiple employer plans. With over 20 years of experience, our partners handle plans ranging from \$100,000 to over \$3,000,000 in assets.

## 1st Year Audits

We specialize in first-year audits, helping you prepare by reviewing payroll, HR, and 401k processes to ensure strong internal controls. We also review plan documents to ensure proper administration and offer recommendations for improvement.

## Compliance Issues

We assist with various compliance issues, including delinquent Form 5500 filings, late participant contributions, and prohibited transactions. Our expertise with IRS and DOL correction programs ensures smooth resolutions.

## Terminating Plans

We guide clients through plan terminations or mergers, ensuring a smooth final plan year.

## Changes in Service Providers

We help clients navigate changes in payroll providers, custodians, and investment advisors, and assist with the RFP process.

## Form 5500s

Our experts prepare and review Form 5500 to ensure accuracy and proper filing.

## AICPA Audit Quality Center Members

We meet rigorous training and review standards. We audit over 120 employee benefit plans annually, offering cost-effective, expert services led by an experienced team.



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