

401(k) Employee Benefit Plan Audits

SERVICES INCLUDE:

- 401(K) AND DEFINED CONTRIBUTION PLAN AUDITS
- 403(B) TAX-SHELTERED ANNUITY PLAN AUDITS
- DEFINED BENEFIT PLAN AUDITS
- EMPLOYEE STOCK OWNERSHIP PLANS (ESOP)
- HEALTH AND WELFARE BENEFIT PLAN AUDITS
- FORM 5500 PREPARATION AND FILING
 - CONSULTING SERVICES
 - INTERNAL CONTROL ANALYSIS
 - ANALYSIS OF PLAN OPERATIONS
 - ADVICE ON COST ALLOCATION STUDIES
 - FACT GATHERING OF PLAN EXPENSES
 - ASSISTANCE WITH REVIEW OF FIDUCIARY RESPONSIBILITIES

When it comes to Employee Benefit Plans, Clarus Partners has you covered. Our team stays current on the latest standards by reviewing the EBSA/DOL Audit Quality Study Reports and by being active in the AICPA's Employee Benefit Plan Audit Quality Center. And with our nimble company structure, you will receive direct partner involvement making your experience more efficient and accurate.

At Clarus, we provide a level of expertise beyond the mechanics of an ERISA audit. Our understanding of complex ERISA rules allows our clients to focus on their business instead of on regulatory tax reporting requirements. We also have developed specific planning and auditing procedures to minimize confusion and eliminate unnecessary document requests. Our internally developed methodology adapts to the ever-changing Employee Benefit Plan audit environment. Our structure means we are nimble and flexible, allowing us to design a custom service program for you while keeping costs to a minimum

Our team of employee benefit plan specialists—which boasts more than 20 years of experience—stays up-to-date in this highly technical practice area by participating in various industry education programs, including the AICPA's National Conference on Employee Benefit Plans. As a member of the AICPA Employee Benefit Plan Audit Quality Center, you can be sure all our professionals are well-versed in current professional standards, rules, and regulations.

We understand the concerns of beginning a new relationship—it can be a daunting prospect. We are dedicated to ensuring the transition to our firm is as efficient as possible. Our dedicated team members are specifically trained to conduct employee benefit plan audits. This allows us to ask targeted and pointed questions to streamline the transition process.