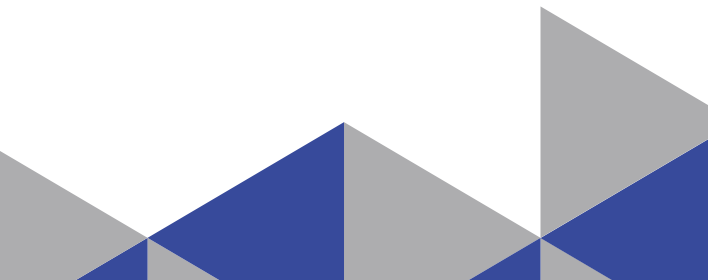


EMPLOYEE BENEFIT PLANS

IMPROVING EFFICIENCY AND
ENSURING COMPLIANCE



ABOUT US

Calibre CPA Group is a full-service accounting and advisory firm with big capabilities. We focus on helping organizations nationwide make a difference through proactive value-added accounting, audit, taxation, forensic and consulting services.

With offices in the Washington, D.C., Chicago, and New York metropolitan areas, our specialists work hand-in-hand with our clients to help them stay ahead of financial developments and guide them through the complexities of accounting and reporting regulations.

WHY CALIBRE CPA GROUP

- ✦ Highly personalized service through partner oversight and participation in all engagements
- ✦ Knowledge and expertise in critical DOL regulatory and compliance issues
- ✦ Specialized employee benefit plan training and experience
- ✦ Exceptional client roster showcasing expertise, experience and trust
- ✦ Continued investment in staff professional development to retain best and brightest
- ✦ Proactive sharing of constructive insights and recommendations with clients
- ✦ Honed processes and methodologies delivering efficiency and cost savings

CONTRIBUTIONS COMPLIANCE



PAYROLL AUDITING

An employer payroll compliance audit program helps plans determine if their participating employers are reporting and contributing for covered employees. These programs effectively and efficiently aid trustees in meeting their fiduciary responsibility and benefit members by making sure benefits are calculated based on correct contribution amounts.

Our experienced management team actively reviews each client's audit program, providing insights and recommendations from time-saving technologies to implementing controls to further safeguard that all reporting requirements are met.

DOL & IRS REGULATORY REPORTING



HELPING YOU NAVIGATE COMPLEX CHANGES AND REQUIREMENTS

Our complete scope of tax services includes much more than just simply preparing a government filing. We provide our clients with strategic tax planning, filing, and compliance expertise, making the entire process easier and saving valuable time and money.

We help employee benefit plans develop and implement tailored compliance strategies that fit their unique needs and get them closer to achieving their goals.

ACCOUNTING & FINANCIAL SERVICES



FREEING UP YOUR TIME SO YOU CAN FOCUS ON WHAT MATTERS MOST

Running an organization is a complicated and stressful job, but adding in reporting deadlines, changing requirements and limited internal resources can make it even tougher. To help make our clients' lives easier and enable them to put the focus back on their Funds' mission of providing benefits to participants and their beneficiaries. We offer a full suite of accounting and financial solutions.

Our solutions simplify our clients' accounting functions by allowing them to delegate many time-consuming and tedious accounting tasks to our team so they can concentrate on what matters most. Your organization can engage our team to handle specific accounting and financial services for any length of time, helping them remain cost-effective.

THE EMPLOYEE BENEFIT PLAN SPECIALISTS

Our staff has extensive experience working with plans of all sizes across the country, partnering with trustees, administrators, and other services providers to help them comply with Federal regulations. Our clients range from small plans with assets of less than \$500,000 and 100 participants to plans with assets of \$15 billion and more than 200,000 participants.

Regardless of employee benefit plan size, our clients can count on our extensive experience and responsive service. Our low client/partner ratio gives each client the same high level of attention from experienced audit professionals.

As one of the only CPA firms in the country with a national payroll audit program, Calibre CPA Group is highly unique and skilled in this area. We have a dedicated team of more than 30 auditors who conduct more than 3,400 payroll compliance audits throughout the United States each year.

OUR SPECIALISTS ARE INDEPENDENT
AUDITORS FOR MORE THAN 330
EMPLOYEE BENEFIT PLANS.

We audit a broad spectrum of public pension funds, single employer plans, multi-employer plans, health and welfare benefit plans, training funds, and other ERISA funds and are a member of the AICPA Employee Benefit Plan Quality Center. Our employee benefit plan capabilities include:

- ✧ Audit and Assurance
- ✧ Forensic and Risk Advisory Services
- ✧ Payroll Audit Compliance
- ✧ Tax and Regulatory Reporting
- ✧ Accounting and Financial Services

AUDIT & ASSURANCE SERVICES



EQUIPPING YOU WITH THE INFORMATION
TO MAKE BETTER DECISIONS

Regulations and compliance requirements are constantly changing, which has increased the demand for transparency and clarity in financial reporting. Employee benefit plans must stay ahead of pending changes in order to guarantee compliance. Our advisors provide our clients with a complete spectrum of audit, compliance and advisory services that give them the meaningful information they need to make better financial decisions.

Our value-added approach sets us apart from the competition. We offer your organization more than just an opinion—our auditors are trained to evaluate internal controls and make recommendations to improve or strengthen them. We also provide best practice suggestions and other recommendations for improving financial and operational efficiencies.

FORENSIC & RISK ADVISORY SERVICES



PROTECTING & SAFEGUARDING YOUR ORGANIZATION

All organizations may be exposed to fraud at some point, making it critical to design controls and procedures to manage the risk. Your key stakeholders want to know that your organization is on a sound financial footing. We can provide that assurance to your members, trustees, and other key stakeholders with our forensic and risk advisory solutions. We provide a full range of forensic and internal auditing services allowing our clients to mitigate the risk of fraud and put in place effective fraud prevention processes and procedures.

Our experienced Certified Fraud Examiners provide fraud risk assessments that will identify and mitigate internal control vulnerabilities before they happen. In the event of a potential fraud, our team utilizes specialized forensic techniques to uncover evidence of fraud and quantify the loss.

Our team uses a phased approach to our internal audit services. We help employee benefit plans of any size evaluate and improve their governance, risk management, and internal controls with tailored, cost-effective solutions.

ARE YOU READY TO SEE THE DIFFERENCE?

CONTACT US TODAY TO SPEAK
WITH ONE OF OUR EMPLOYEE
BENEFIT PLAN SPECIALISTS

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