

Stambaugh Ness

Employee Benefit Plan Audit Services

SN's commitment to the Employee Benefit Plan Service Area

- Member of AICPA Employee Benefit Plan Audit Quality Center
- Dedicated team performing over 50 Employee Benefit audits annually
- Well-coordinated fieldwork, with minimal disruption
- Provide thought-leadership throughout the year
- Successfully pass Dept. of Labor audit review

Profiles of the Clients We Serve

- ESOP's, 403b, 401k, Defined Benefit Plans, Health and Welfare Plans
- Participants ranging from 100 to over 10,000
- Plan asset size ranging from \$1 million to \$500 million

Technical Audit Approach

- Efficient coordination of engagement
- Hands-on partner involvement
- Concise listing of what clients need to provide
- No surprises

Transition Services

- Ease in transition
- Well-developed service delivery model
- Proven experience working with various service provider retirement plan platforms

What You Can Expect from SN

- Cohesive, seamless service
- Experienced EB audit specialists
- We take the additional time to explain and educate
- Provide proactive recommendations for plan operations
- Always meet, but usually exceed client expectations

Why Choose SN

- Proactive communication
- Proven depth and bench-strength to serve large EB plans
- Unique "Fixed-Price" Agreements
- "Best of Both Worlds" – regional firm with extensive EB expertise and direct access to national resources

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“With a knowledgeable, approachable service team we focus on building a plan that reflects your individual circumstances, aligning your needs with our expertise.”