

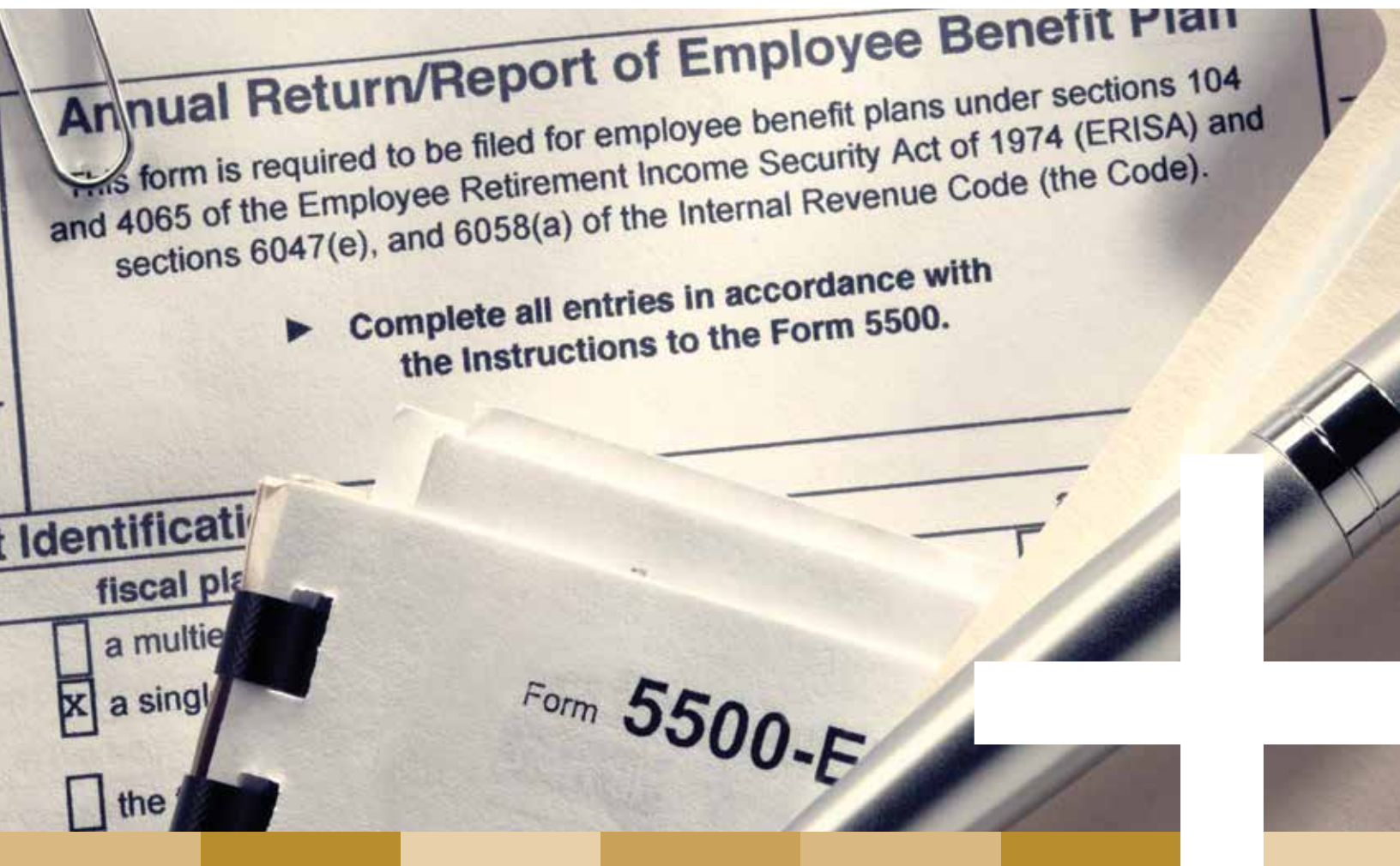


**HENRY & PETERS**

CERTIFIED PUBLIC ACCOUNTANTS | EST. 1929

# Audit, Tax, and Accounting Solutions+ Employee Benefit Plans

More than Accounting.



# Deeper Experience. More Trust.

For building a reputation, confidence counts. That's why so many companies have trusted Henry & Peters for decades. More than 60 years of deep, direct experience in the field—especially with employee benefit plans—provides the real-life familiarity and practical understanding of audit, tax, and consulting services that can make Henry & Peters a trusted partner in your long-term success.

## Integrated Support.

Currently, more than 50 employee benefit plans of all sizes are depending on Henry & Peters—not only for our professional accounting services, but for our intimate understanding of day-to-day operations and industry issues. Beyond helping you maintain compliance and manage costs, we offer integrated, year-round support with a practical perspective, to ease the strain on your staff and help make more sense of where your business is headed.

- External audits
- Best practices for internal control processes
- Due diligence
- Tax preparation (Forms 5500 and 8955-SSA)

Our professionals provide a wide variety of employee benefit plan services and have significant experience with virtually all plan types and filing requirements:

- Defined contribution retirement plans (thrift or savings plans including 401(k) and 403(b), profit-sharing, money purchase pensions, stock bonus and employee stock ownership, and certain target benefit plans)
- Defined benefit pension plans (pension equity, cash balance plans)
- Multiemployer plans
- Multiple employer plans
- Health and Welfare plans
- Firemen's Relief and Retirement Fund plans
- Full-scope audits
- Limited-scope audits

## Employee Benefit Plan Intelligence.

Henry & Peters fields a team of more than 90 professionals with diverse backgrounds and experience in national, regional, and local accounting firms, as well as in various positions in the industry. We have built a wealth of employee benefit plan-specific knowledge through training and from our many years of service to our clients. We have employees that regularly attend local and national conferences in addition to annual training. Henry & Peters and our engagement personnel have the requisite skills, enthusiastic attitude, and personal commitment to successfully serve you well – not only now, but in the years to come. Engagement personnel have extensive knowledge in the following matters:

- Centralized and decentralized accounting and HR environments
- Mergers, acquisitions, plan spin-offs
- Hard-to-value investments
- Current and pending regulatory and accounting pronouncements
- Partial terminations
- Initial audits and stub period audits
- DOL and IRS investigations
- ERISA compliance matters
- Various DOL and IRS correction programs



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Employee Benefit Plan Quality  
Control Center Membership

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