

Employee Benefit Plan Audits



Samuel Goldstein & Co.

Certified Public Accountants

Employee Benefit Plan Audits

QUALITY AND TIMELY AUDITS

Samuel Goldstein & Co. is a CPA and advisory firm that has a deep niche in employee benefit plan audits. We are members of the International Foundation of Employee Benefit Plans and the AICPA Employee Benefit Plan Audit Quality Center. Our firm consistently received the highest rating on the rigorous peer review we go through every three years. We have over 70 years of hands-on experience conducting benefit plan audits and working with and managing the reporting requirements of the U.S. Department of Labor, the IRS and The Pension Benefit Guaranty Corporation. We are experienced in DOL audits.

Our professionals are highly trained and have a thorough understanding of the complex and changing requirements of ERISA. We are experienced at handling issues affecting both single employer and multi-employer benefit plans.

**Closely Held
Companies**

**Not-for-Profit
Organizations**

**Multi-Employer
Plans**



Fixed Price Plan Audits

Experienced Auditors Delivering Quality Engagements

SINGLE & MULTI-EMPLOYER BENEFIT PLANS

- 401(k) & 403(b) plans
- Pension & profit sharing plans
- Health & welfare plans
- Employee stock ownership plans (ESOPs)
- Medical plans
- Labor unions
- Vacation, education & training plans

THESE SERVICES INCLUDE

- Audit, review & compilations
- Limited scope audits & 401(k) plans
- Fair share reports
- Agreed-upon procedure engagements
- Payroll compliance audits
- Form 5500 preparation
- Form 990 preparation
- LM-2 preparation

THE BENEFITS OF USING OUR FIRM

This niche is a major part of our firm; therefore, we have become truly efficient in the process. We pass the benefit of these efficiencies on to our clients by providing a high-quality audit at a cost-effective rate.

- Fixed fees
- Cost-effective, quality audits
- Advanced scheduling to ensure a smooth audit
- Minimally disruptive audits to keep your staff productive

OUR COMPLETE SERVICE PORTFOLIO

Financial Reporting

- Customized management reports
- Personal financial statements
- Audits, reviews & compilations
- Agreed upon procedures
- Internal controls and assessments

Accounting Support

- Assistance closing the books
- Management of in-house financial personnel
- Setting up a uniform chart of accounts
- Accounting system installation
- Ensuring tax compliance & reporting

Tax Planning & Return Preparation

- Business entity tax returns
- Sales & use tax and multi-state tax issues
- Business tax planning
- Entity selection; i.e. partnerships, LLCs
- Personal tax planning
- College & retirement planning
- Estates & trusts
- Family wealth & gifting strategies
- Tax audit & inquiry representation
- Individual tax returns

Other Services

- Managed accounting/back office support services
- Part-time CFO & controllership
- Advisory & support
- Special projects

*Don't be the only one responsible
for retirement plan security.*



“Entrepreneur Focused, Technology Driven”

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