

## Employee Benefit Plan Audits

### Experience and Qualifications

Insero & Co. has grown into one of the largest accounting and business advisory practices serving many companies throughout the United States. Our Benefit Plan Audit Team is a group formed within the Audit Division and trained in benefit plans. More importantly, they are dedicated to benefit plans. We are one of the top 25 benefit plan accounting firms in the United States based on total plan dollars audited and serve clients in over 30 states. What this means for our clients is that we have the experience that rivals any firm of any size which translates to a smoother process and more valuable insights for managing your plan.



Our success is simple – we have built a unique, national practice on a foundation of benefit plan engagement teams that are knowledgeable in all aspects of plan auditing. We deliver financial statements and Form 5500 in a timely and cost-effective manner. In addition to our benefit plan audit experience, the real benefit to you is our knowledge of ERISA and the ability to provide answers to your questions from filing and reporting requirements to complex interpretations of benefit regulations.

Many clients come to us because their benefit plans are not treated as a priority by their service providers, and the related cost structure is overpriced. If your service is less than top notch, let us show you why companies such as Eastman Kodak Company, Corning, Inc., and Frontier Communications are using the Insero & Co. Benefit Plan Team to complete their required audits and prepare financial statements and Form 5500. We are confident we can save you money and raise the service bar!

### A service philosophy focused on quality

Quality service is a core tenet of our service philosophy. Insero & Co. consistently provides accurate services for our clients. You can depend on the quality of our work to help you make sound business decisions. The Highest Standard is not just a tagline for us; it is the way we deliver service as evidenced by recent examinations of our work by the Department of Labor and the PCAOB which again have resulted in no findings.

### Recognized Reputation

We have developed and maintained a recognized reputation for working closely with our clients. Our reputation is built on a simple premise: our partners and managers are accessible to our clients. As a result, our client retention record is a model for regional firms as many of our clients have been with our firm for over 20 years, ensuring a level of understanding of your institution which enables us to offer proactive advice.

Staff continuity is another benefit you can expect. Our consistent ranking as one of the nation's Best Accounting Firms to Work for by Accounting Today and Best Companies Group is just one of the reasons our turnover rate is well below the industry average. You can rest assured that you will work with the same people regularly.

## Quality Standards

The firm has been built by maintaining the highest quality standards. We monitor changes and new developments in accounting and auditing standards, retirement and benefit plan regulations and tax legislation. More importantly, we share that information with our clients. Our firm is committed to upholding the standards of the American Institute of Certified Public Accountants; and we undergo a peer review by an outside public accounting firm every three years. Such a review assures our clients that we meet the highest quality standards in the accounting profession. In addition, the firm conducts its own internal review on an annual basis.

We are also registered with the Public Company Accounting Oversight Board (PCAOB), the AICPA Employee Benefit Plan Audit Quality Center and the AICPA Center for Public Company Audit Firms, so you can be assured that we are up to date on all current regulations as well as have met the high standards of the regulatory bodies for our profession.

You'll work with a team of graduates of highly regarded colleges and universities who are members of accounting societies, such as the American Institute of Certified Public Accountants, as well as a variety of state societies of public accounting.

## Fees

One of the greatest benefits of a regional firm is lower overhead than a larger firm, meaning lower fees for our clients. As a result, our fee structure is very cost effective. You'll receive value that is directly proportionate to the fees involved as a result of a low fee structure for services delivered by an experienced team.

Routine telephone calls are expected and even encouraged. We do not bill for such normal consultation. In the very unlikely event your questions result in a significant effort, we would expect to meet with you to reach a mutually-agreeable fee. You can be assured of a no surprises, no excuses approach to service.

## Summary

We are excited to serve you and believe that our commitment to quality service, technical expertise, and our personalized approach will exceed your expectations. Please call us for a no-cost, no-obligation conversation to discuss your plan audit needs.

For more information, visit [www.benefitplanauditors.com](http://www.benefitplanauditors.com) or contact:



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