

# EMPLOYEE BENEFIT PLANS



GREER & WALKER, LLP  
CERTIFIED PUBLIC ACCOUNTANTS



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### **WHO IS GREER & WALKER, LLP?**

Founded in 1984, Greer & Walker, LLP is the largest Charlotte-based full service accounting and consulting firm, with more than eighty staff members. We provide high quality accounting, tax, and advisory services with a personal touch to a wide range of business and individual clients.



## **WHY GREER & WALKER?**

Employee benefit plans face numerous complexities, such as tax and regulatory compliance issues as well as continually changing standards. Your professional service team should possess the specialized knowledge to provide you with the resources necessary to manage these issues.

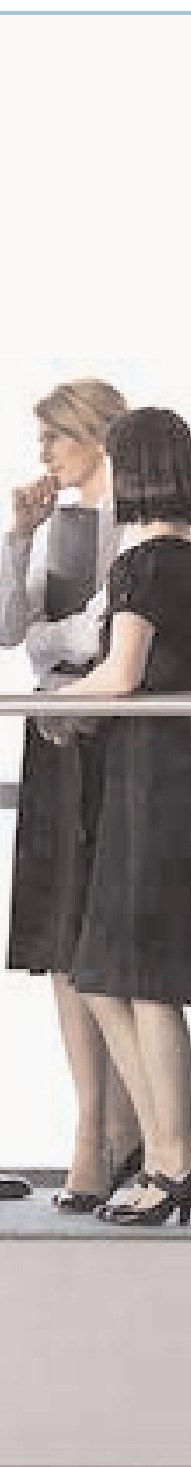
Our employee benefit plan team of professionals serves a large group of clients in various industries. Through our experience with these clients, we have developed the specialized knowledge that allows us to handle not only the accounting and tax issues, but more importantly, to assist plans in meeting the reporting and filing requirements imposed by the Department of Labor (DOL) and Internal Revenue Service (IRS). Our involvement with specialized trade groups, education seminars, and PKF International (a network of legally independent accounting firms throughout the world) keeps us abreast of the current issues affecting employee benefit plans and allows us to offer you a high level of expertise without the fees required to support the overhead of a national firm.

## HOW CAN WE HELP YOU?

The never ending changes in federal regulations governing retirement plan compliance continue to become more complex. As you consider your options for a plan auditor, consider Greer & Walker, LLP.

Greer & Walker has a team of professionals dedicated to providing professional services to the employee benefit plan industry. Our team receives extensive, ongoing compliance training, keeping us ahead of the curve on new developments and techniques. This provides peace of mind to clients, while improving audit efficiency.


We work directly with you and your plan sponsor, trustee, or administrator to reduce your risk while minimizing disruption to your staff. Our approach ensures delivery of high quality services at a competitive price. Our standards of accountability, responsiveness, and proactive problem-solving provide you with the service you require during the audit process. Throughout the engagement, our goal is to add value through recommendations that will help you improve your plan and ensure compliance with various regulations.



## HOW CAN WE HELP YOU? (CONTINUED)

Through the expertise that we have developed by serving the employee benefit plan industry, we can provide guidance and advice in areas such as:

- Public and private companies' and not-for-profit organizations' audits of 401(k) plans, 403(b) plans, health and welfare plans, defined benefit pension plans, money purchase pension plans, cash balance plans, employee stock ownership plans (ESOP's), and profit sharing plans
- Monitoring plans for regulatory compliance
- Proposing solutions for identified non-compliance and advising plan sponsors
- Preparation and review of IRS and DOL reporting and disclosure forms
- Evaluation and analysis of service providers
- Practical recommendations to improve internal procedures
- Implementation of a focused, proven, step-by-step approach to planning and executing the audit process, yielding a timely and efficient result

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- Identification of weaknesses in control objectives stated in SAS 70 reports provided by service organizations
  - Comprehensive analysis to determine that your plan's operation complies with both its documentation requirements as well as the relevant Employee Retirement Income Security Act (ERISA) provisions that apply to for-profit and not-for-profit organizations.



## INDUSTRY RESOURCES

Greer & Walker's associates are active members and leaders of the following trade associations:

- Employee Benefit Plan Audit Quality Center (EBPAQC)
- North Carolina Association of Certified Public Accountants
- American Institute of Certified Public Accountants

## MEMBERSHIP IN PKF INTERNATIONAL

**PKF** Greer & Walker is the exclusive Charlotte member firm of PKF International, a worldwide network of legally independent accounting and consulting firms. With more than 230 firms in 400 locations throughout 120 countries, we can offer our clients first class services and advice wherever they are in the world. "Local expertise wherever you are" is the PKF promise.

Member firms of PKF International share the same commitment: high quality, partner-led services tailored to each client's requirements and grounded in local knowledge. At the same time, membership in the network allows the sharing of knowledge, experience, and skills that is so vital for our clients who do business



## PKF INTERNATIONAL (CONTINUED)

in more than one state or country. This means we can provide our clients with a quality service that focuses on the specific needs of each client and addresses their business challenges with creative solutions that are grounded in practical experience and high levels of expertise.

More importantly, PKF International means a global standard of quality for you. Wherever you take your business, you can be sure of a trusted PKF firm to support you with the same care and skill that we insist on at Greer & Walker, LLP.

PKF International is a member of the Forum of Firms—an organization dedicated to consistent and high quality standards of financial reporting and auditing practices worldwide.



## CONTACT US

To discuss how our employee benefit plan services expertise can benefit your business, contact Mike McNamara or Melissa Critcher at (704) 377-0239.



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