

SOLUTIONS BEYOND THE OBVIOUS

Employee Benefit Plan Services



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Audit

It can be challenging for an employer to understand and comply with the numerous fiduciary responsibilities accompanying employee benefit plan offerings. Tronconi Segarra & Associates has extensive experience with audits of employee benefit plans for public and private plan sponsors of defined benefit and defined contribution plans. We have been accepted as members of the AICPA Employee Benefit Plan Audit Quality Center ("EBPAQC"); and we continue to demonstrate that we meet the stringent qualifications required to earn this designation by following specific audit policies and procedures and obtaining annual continuing professional education specific to employee benefit plans. Furthering our commitment to providing the highest quality of services to our clients, we are members of the International Foundation of Employee Benefit Plans.

We offer our clients a documented, streamlined audit approach, a timetable from audit inception to completion, and superior client service every step of the way. Specific employee benefit plan audit services include:

- Full scope or limited scope audits of qualified defined contribution and defined benefit employee benefit plans as required by the Employee Retirement Income Security Act ("ERISA").
- Audits of 401(k), 403(b), profit sharing, pension and multi-employer plans.
- Multi-employer and single-employer Taft-Hartley employee benefit plan audits, and training fund audits.
- Audits of welfare benefit plans.
- Review of Form 5500.
- Multi-year audits of plans not compliant with annual reporting obligations.
- Consultation regarding operational defects.
- Consultation regarding plan termination.
- Consultation regarding issues of eligibility, vesting, deferral calculations and remittance and employer contribution calculations.
- Technical updates on DOL or IRS matters.

Tax

Tronconi Segarra & Associates offers a wide range of tax compliance and planning services to qualified retirement plans and equity-based plans such as options, SARs and phantom stock. Specific tax services include:

- Annual Form 5500 preparation.
- Annual contribution calculations and allocations.
- DOL notice filings
- SARs/phantom stock design assistance and review
- Tax advice

TRONCONI SEGARRA
& ASSOCIATES^{LLP}

Certified Public Accountants
Business Consultants



The Benefits of Engaging Tronconi Segarra & Associates

- Your professional services will be provided by skilled, experienced CPAs, accountants and other para-professionals focused on delivering your work accurately and efficiently.
- Partners and senior management team members of our Firm will be actively involved in client engagements.
- You will work with a team of professionals who will actively listen to you to understand your unique needs, which will be the basis for our approach to tailoring an engagement that best suits you.
- We will look for opportunities to add value to every engagement we perform for you and will draw on our years of expertise and best practices gained across a wide range of industries to provide you with additional insights, competitive rates and exceptional client service.
- Above all, Firm associates will exhibit qualities of honesty, integrity, enthusiasm and innovation in the delivery of professional services to you.

Some of the industries we serve include:

- Manufacturing
- Wholesale/distribution
- Healthcare companies
- Medical practices
- Medical imaging facilities
- Higher education
- Labor unions
- Automobile dealerships
- Technology companies
- Financial institutions
- Convenience stores/chains
- Professional services firms
- Municipalities and other governmental sectors
- School districts
- Not-for-profit organizations and foundations
- Franchisees
- Gaming/entertainment/sports venues
- Foodservice
- Utilities

To learn more about our Employee Benefit Plan services, contact partners Diane Straka or Nick Fabozzi; or visit us at www.tsacpa.com.



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Members - American Institute of Certified Public Accountants (AICPA) and the New York State Society of Certified Public Accountants (NYSSCPA).