

Employee Benefit Funds

Value-Added Services for Employee Benefit Funds:

Audit
Payroll (Employer Compliance) Audit
Outsourced Accounting
Tax Planning & Preparation
Management and Strategic Consulting

Who is Calibre CPA Group?

Founded on a mission to **provide services of a superior calibre**, Calibre CPA Group was established by several CPAs whose careers have focused on providing a comprehensive array of audit, outsourced accounting, tax, and consulting services to employee benefit funds throughout the country. We're now one of the major "niche" CPA firms in the country that has devoted a large part of our practice to this sector.

Approximately 80% of Calibre CPA Group's clientele is comprised of tax exempt entities, particularly labor organizations and their related employee benefit funds.

How Can Calibre CPA Group Help Me?

Face facts ... the administration of your employee benefit plans is a complex and tedious process. Far too often, companies make mistakes with their benefit plans by not understanding the impact of new regulations or policies. As specialists in this complex and ever-changing area, Calibre CPA Group can help you with in-depth recommendations and assistance to ensure your employee benefit plans are in compliance with federal laws and reporting requirements. Our seasoned advice will allow you to focus more time on running your organization ... and less on your benefit plans. We've helped all types of single and multiemployer plans by providing services in areas that include:

- Plan Audit and Preparation of IRS/DOL Reporting and Disclosure Forms
- Payroll Audits of Participating

Employers (for multiemployer plans)

- Claims Audits
- Computation of Fidelity Bonding Requirements
- Preparation of Participant Statements and Other Notifications
- Participant Record-Keeping and Internal Control Analysis
- Analysis of Plan Operations
- Advice on Cost Allocation Studies

Our client list includes the following types of employee benefit funds:

- Retirement
- Health & Welfare
- 401(k)
- 403(b)
- Profit Sharing
- Vacation and Training
- Defined Benefit
- Defined Contribution

Why Should I Use Calibre CPA Group?

INDUSTRY EXPERIENCE

Over the years, Calibre CPA Group has worked with clients ranging from small employee benefit plans (those with less than 100 participants) to those with assets of over \$8 billion (and over 100,000 participants). These clients come from virtually all industries. We've worked our clients, helping them to maximize their plans' operations, so they can offer the best benefits packages to their employees. We can provide the same expertise to you too.

INDUSTRY KNOWLEDGE

Our firm has dedicated professionals whose responsibility is to provide com-

prehensive services for our client's employee benefit plans. A number of our staff are active members of the International Foundation of Employee Benefit Plans (IFEBC) and our firm is a member of the Employee Benefit Plan Audit Quality Center (a division of the AICPA). We work diligently to stay abreast of the legislative and regulatory issues of the day and regularly interact with Department of Labor and Internal Revenue Service personnel on behalf of our clients.

Want to Know More?

Contact us toll-free at 866.464.2839, drop a line to our company email (info@calibrecpa.com), or visit our website at www.calibrecpa.com.



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