

EMPLOYEE BENEFIT PLANS

As a leading Certified Public Accounting firm in the New York region, Marks Paneth & Shron LLP (MP&S) is very experienced with providing audits of employee benefit plans as well as providing related tax and consulting services.

Our pension specialists follow a focused approach to handling the audits of employee benefit plans and have excellent credentials. We have helped organizations with their financial statement compliance needs related to defined benefit plans, defined contribution plans, health and welfare plans and employee stock ownership plans. Our practitioners also have extensive knowledge in the preparation and review of Form 5500 and related forms. We take pride as well in offering additional consulting services; thereby adding value to the operation of the plan.

MP&S offers our clients deep expertise combined with a flexible service approach and timely, personalized attention. We understand the specific needs of plan administrators. Our clients range from well-known global organizations with plans in excess of 15,000 participants and assets in excess of \$1.3 billion to smaller entities with approximately 100 participants and assets in the six figure range.

We serve clients in a broad spectrum of industries. These include transportation (including one of the premier international airline carriers), biotechnology, not-for-profit as well as financial and professional services firms.

Types of Employee Benefit Plans Served:

- Defined Benefit Plans
- Defined Contribution Plans
- Employee Stock Ownership Plans (ESOP)
- Health and Welfare Plans

Audit Services Offered:

- Full Scope Audits of Financial Statements
- Department of Labor (DOL) Limited Scope Audits of Financial Statements
- Initial-Year Plan Audits
- Audits of Plans with Fewer than 100 Participants to More than 15,000 Participants
- Audits of Plans with Publicly Held Companies as Sponsors (Form 11K)
- Audits of Plans for Nonprofit Organizations

Tax Services Offered:

- Preparation of Form 5500 and Related Tax Filings
- Determination of Financial Statement and Form 5500 Filing Requirements

Consulting Services Offered:

- Optimization of Benefits
- Assistance with the Design and Implementation of Plans