

Pricing

Our competitive fees for a limited scope audit, the most common type of retirement plan audit, usually range from \$8,500-\$15,000, whether your plan has 100 or 1,000 eligible participants.

Our most competitive pricing is provided when the audit can be scheduled during May, June, July, or August.

Please contact us at 248.208.8860 for a free customized proposal with pricing.

For more information on how our Employee Benefit Plan Audit team can help you, please contact Jim Biehl or Sarah Russell at 248.208.8860. To learn more about our other services, visit our website at www.claytonmckerverve.com.



EMPLOYEE BENEFIT PLAN AUDITS

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A close-up photograph of a person's hands holding a pair of glasses over a document. The person's index finger is pointing at a specific line of text on the page. The background is blurred, focusing attention on the hands and the document.

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EMPLOYEE BENEFIT PLAN AUDITS

As required by ERISA

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 Clayton & McKervey.

Does your plan meet the requirements for needing an audit?

Generally, federal law requires employee benefit plans with 100 or more participants to have an audit as part of their obligation to file an annual return/report (Form 5500 Series). If your plan has filed as a small plan in the past, that threshold increases to 120 eligible participants.

What We Provide

Clayton & McKervey has dedicated an area of our practice to providing audit and consulting services. The team receives extensive, ongoing compliance training, keeping them ahead of the curve on new developments and strategies. This provides peace of mind to clients, while improving audit efficiency.

In addition to auditing our clients' retirement plans, we also work with clients who use other CPAs for their business accounting needs without disrupting their relationship.

Count on us to provide audits, which meet the requirements of the Employee Retirement Income Security Act (ERISA), the Department of Labor (DOL), and the Internal Revenue Service (IRS). Additionally, we are one of about 100 members of the Audit Quality Center of the American Institute of Certified Public Accountants.

How You Benefit

- ▶ Timely delivery of a high quality audit at competitive prices.
- ▶ Practical recommendations that, in turn, have helped clients refine internal procedures, saving time and money for their organization.
- ▶ Assistance in developing strategies to maximize contributions, as well as positioning your plan as an employee recruiting and retention tool.

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