



CPAS & ADVISORS

EMPLOYEE BENEFIT PLAN CONSULTING



Customized
solutions to fit your
unique needs



IMPORTANCE OF A SOUND BENEFIT PLAN

Often helping with the recruitment and retention of employees, it is important to understand how to maintain a sound employee benefit plan. As benefit plans continue to become more complex with enhanced Department of Labor (DOL) regulations and tax compliance requirements, choosing the right provider is imperative. KPM understands and works with a variety of clients to help them develop and maintain sound benefit plans. We pride ourselves on the ability to provide customized solutions based on your unique needs. We have experience with the following plan types:

- Defined Contribution Plans
 - 401k & 403b Plans
- Health & Welfare Plans
- Employee Stock Ownership Plans (ESOP)
- Defined Benefit Plans

SERVICES

Our advisors provide a variety of services including:

- Recordkeeping - tracking & allocating transactions in addition to accounting for plan assets
- Third Party Administration - completing required tax returns, performing testing/compliance, preparing plan documents, & planning/coordinating distributions
- Investments - working with you to develop customized plan investment solutions
- Consulting - plan design & review, assistance with DOL or IRS inquiries, assisting with contribution projections/calculations, & developing plan strategies in addition to a myriad of other services
- Valuations - providing a stock valuation for your ESOP plan

CONTACT KPM

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