

OPTIMIZE BENEFITS. GAIN A TALENT MAGNET.

Employee benefit plan compliance issues are complex, requiring help from trusted professionals who understand the complexities, challenges, rewards and opportunities associated with effective retirement planning. Smith Schafer can guide you through every facet of structuring and managing the right employee benefit plan program for your organization.

Retirement Plan Consulting:

- Plan Selection and Design
- Fiduciary Training, Education and Compliance Reviews
- Consulting on General and Specific Plan Issues

Third Party Retirement Plan Administration:

- Plan Document Preparation and Maintenance
- Compliance with Department of Labor and Internal Revenue Service Regulations
- Participant Record Keeping

Employee Benefit Plan Audit Services:

- 401(k), Profit Sharing, 403(b), and ESOP
- Health and Welfare Plans

CORE INDUSTRIES SERVED:

- Specialty Contractors
- Manufacturing
- Hospitality
- Professional Service Firms
- Real Estate
- Nonprofit
- Government
- Transportation
- Auto Dealerships
- Retail

“Smith Schafer has conducted the audit of our 403(b) plan. We are very pleased with their performance, efficiency and knowledge. The Smith Schafer team has been easy to work with and has earned our trust and confidence by demonstrating value through their ability to provide high quality services in a timely manner and at a reasonable price. The entire staff is fully responsive and dedicated.”

—Lynn Sorenson, Minnesota Valley Action Council

Whether you are a prospective client, referring professional or someone exploring an accounting career or lateral move, Smith Schafer has been a clear choice for intelligent and sophisticated advisory services for more than 45 years. *Contact us.*

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