



GT REILLY & COMPANY

CPAs and Advisors

www.GTReilly.com

424 Adams Street
Milton MA 02186
617-696-8900

Retirement Plan Sponsors



In today's competitive marketplace, employee benefits plans are critical to recruiting top candidates for jobs, as well as fostering goodwill and company loyalty with current staff.

The integrity of your organization's retirement plan ensures that you can fulfill the promise you make to your employees as participants in your retirement plan.

GT Reilly & Company provides services to both large and small employee benefit plans. Our guidance goes beyond annual required ERISA audits for defined contribution plans and defined benefit plans. Experienced professional staff consult with clients on the design of pension plans that fit their companies' needs. We help you understand the various plan types available and features within the plans, and the impact the plan type and features may have on your finances and plan operations.

Our Experience:

AUDIT AND RELATED SERVICES

- ◆ ERISA Plan Audits
- ◆ Department of Labor Form 5500 Filings
- ◆ Liaison with Third Party Plan Administrators
- ◆ Representation for IRS and DOL Audits

CONSULTING SERVICES

- ◆ 401(k) and 403(b) Plan Design Review
- ◆ Nondiscrimination Testing and Corrective Actions
- ◆ Participant Eligibility and Compliance Reviews



Kevin J. Bonnett, CPA
Vice President & Director
KJB@GTReilly.com
617.898.0183



Linda J. Kramer, CPA, MBA
Accounting & Auditing Director
Director of Employee Benefit
Services
LJK@GTReilly.com
617.898.0160

