

Retirement & Employee Benefit Plans



Existing Retirement Plan Design Review and Consulting

Retirement Plan Design & Implementation

Retirement Plan Administration

Form 5500 and 1099Rs Filings

401(k) Vendor and Fee Review

IRS & DOL Compliance Review



Focused on Retirement & Employee Benefit Plans

Retirement and Employee Benefit Plans vary from business to business, each having their own distinct challenges and requirements. At Porte Brown LLC, our trained consultants recognize the uniqueness of each plan and take a proactive and personal approach to designing a qualified retirement or benefit plan.

Why It's Important

Porte Brown's retirement and benefit services are customized to fit the needs of our clients. Our comprehensive understanding of employee benefit plans, along with our expertise in tax knowledge, allows us to optimize our administrative services and identify your specific retirement or benefit plan goals.

How We Do It

Porte Brown is unique in that we utilize our **Third Party Administrators (TPAs)** and our accounting professionals. Our goal as the TPA is to assist the plan sponsor in meeting their fiduciary responsibilities, so they can focus on their business and employees.

Advantages of Having Your TPA & CPA Working Together

- **Seeing the Bigger Picture.** Your CPA is already serving as your tax advisor, and for many small plans, one of the goals of the retirement plan is to serve as a tax shelter. When a plan sponsor brings their retirement plan to Porte Brown, the plan sponsor receives the added benefit of a plan design that keeps the plan sponsor's goals front and center – whether that means greater tax benefit or increased retirement income for the business owner.
- **Understanding Complex Code.** Retirement plans are highly regulated by the IRS and DOL. When a TPA and CPA administer a retirement plan, plan sponsors have the advantage of having their financial information under one umbrella and using the tax code to their advantage.
- **Greater Personal Wealth.** Your CPA can more successfully serve as a trusted advisor to a plan sponsor when he or she understands the complete financial goals of the business and the individual. By putting all of the pieces together, the TPA and CPA can provide more detailed strategies, effectively helping the plan sponsor meet his or her personal wealth goals.

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**At Porte Brown, our strength lies in our experience.
Our team includes:**

- Certified Public Accountants (CPA)
- Qualified 401(k) Administrator (QKA)
- Chartered Global Management Accountants (CGMA)
- Certified Construction Industry Financial Professionals (CCIFPs)
- Certified Valuation Analysts (CVA)
- Certified Exit Planning Advisor (CEPA)
- Certified Divorce Financial Analyst (CDFA)
- Certified Information Technology Professionals (CITP)
- Certified QuickBooks Professional Advisors
- Intuit Premier Reseller (IPR)
- Microsoft Certified Professional (MCP)
- Microsoft Certified Technology Specialist (MCTS)
- Microsoft Small Business Specialist



Providing Retirement & Employee Benefit Services for the following industries:

- Manufacturing & Distribution
- Construction & Contractors
- Not-for-Profit
- Professional Services
- Grocery & Food Services
- Individuals
- Transportation & Logistics

Accounting & Business Solutions

In addition to our traditional accounting services, our technology experts help clients select, build systems with customized programs and reports, and provide onsite staff training and support. Our consultants are degreed accountants who have technical knowledge of numerous accounting software packages.



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