

BENEFIT PLAN SERVICES

OVERVIEW

Our team audits benefit plans of all sizes, and our experience spans a variety of industries. We work with plans that include complex investments and plan provisions as well as those with differing service providers. In an era of heightened regulatory scrutiny, Whitinger & Company brings expertise and technical knowledge to deliver assurance services that give you confidence.



QUALITY AUDITS, MEANINGFUL INSIGHT, AND REDUCED FRUSTRATION… WE UNDERSTAND OUR BENEFIT PLAN CLIENTS!

- **Specially trained & dedicated professionals**
- **Remote or on-site service all year round**
- **On-time completion**
- **Focus on compliance plus improved internal controls**
- **Will work with your TPA**
- **Member of AICPA Employee Benefit Plan Audit Quality Center**

AICPA®

Whitinger & Company is a member of the American Institute of Certified Public Accountants (AICPA) Employee Benefit Plan Audit Quality Center for CPA firms. This membership is available to firms who demonstrate a commitment to employee benefit plan audit quality and raise awareness of the importance of employee benefit plan audits. Established in 2004, this center provides the guidelines and tools that CPAs need to perform high quality benefit plan audits.



YVETTE LAMIE, CPA

Senior Manager

Yvette brings more than thirty years of comprehensive public accounting experience to her role as Senior Manager at Whitinger & Company. She oversees all aspects of the employee benefit audit process, including scheduling, planning, fieldwork, workpaper review, audit report issuance, and income tax preparation. Yvette holds a Bachelor of Science in Accounting from Indiana University and is a Certified Public Accountant (CPA). Her ability to build strong relationships and communicate complex financial information clearly makes Yvette a valued advisor to both clients and colleagues.



ALISON REICHARD, CPA

Manager

In her role as Manager, Alison is a leader in the firm's audit division specializing in employee benefit plan and nonprofit audits. She coordinates all aspects of the audit process, including scheduling, planning, fieldwork, workpaper review, audit report issuance, and income tax preparation. Alison is a Certified Public Accountant (CPA) who attended Ball State University, where she earned her bachelor's degree and master's in accounting. Alison is dedicated to helping organizations achieve their financial reporting objectives while maintaining the highest standards of integrity, accuracy, and professional service.



ROSS SWALLOW, CPA

MEMBER/OWNER

As a Member/Owner with Whitinger, Ross oversees audit engagements and financial statement preparation projects with a thorough understanding of accounting standards, regulatory requirements, and industry best practices. Known for his collaborative leadership style, Ross mentors and develops team members while fostering a culture of accountability, technical excellence, and exceptional client service. Ross is a Certified Public Accountant (CPA) and a member of the Indiana CPA Society, American Institute of Certified Public Accountants, and the East-Central Indiana Estate Planning Council.

TYPES OF EMPLOYEE BENEFIT PLANS

- 401(k) & Profit-sharing
- 403(b)
- Money Purchase Pension
- Defined Benefit
- Health & Welfare
- Multi-employer

BENEFIT PLAN SERVICES OFFERED

- Audit of financial statements
- Preparation of Federal Tax Forms 5500 and 990
- Guidance on compliance requirements set forth by the Department of Labor and the Internal Revenue Service
- Review of internal procedures and processes
- Assistance with prohibited transaction remediation