



Quality Employee Benefit Plan Audits

STATEMENT OF QUALIFICATIONS

OUR GOAL:

To provide the highest quality employee benefit plan audit and compliance services by our partners and staff who have significant Big 4 firm experience, at a fair fee.



Boris Benic and Associates LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

Our Managing Partners



Boris Benic

✉ bbenic@bbcpas.com

☎ 516.248.7361 x102

Boris started the firm in 1993. With over 10 years experience with a Big 4 Firm and over 30 years experience in public accounting, Boris provides personalized and practical hands-on services, in all aspects of auditing and tax advice to his clients and ensures they are satisfied with the quality of the services they receive.



Robert Puerto

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☎ 516.248.7361 x103

With over 8 years experience with a Big 4 Firm and over 25 years experience in public accounting, Robert is a results oriented financial professional, providing high quality auditing, tax and advisory services to individuals, businesses and Employee Benefit Plans.



Employee Benefit Plan Experience

By delivering focused audits through innovation and a rigorous staff training program, we have performed over 500 employee benefit audits. The current plans that we audit collectively have over 25,000 participants and net assets of over \$1 billion. We are members of the AICPA's Employee Benefit Plan Audit Quality Center which requires:

- ✓ Mandatory continuing education
- ✓ Internal quality reviews
- ✓ Highest practice standards
- ✓ Third-party external inspections / peer reviews

To quote the Department of Labor...



“CPA firms that were members of the AICPA Employee Benefit Plan Audit Quality Center tended to produce audits that have fewer audit deficiencies.”

Why Have Us Audit Your Employee Benefit Plan?



Proactive Partner Involvement

Boris Benic and Robert Puerto will be actively involved in your employee benefit plan audit services. We will meet with you regularly to discuss your benefit plan audit, compliance matters, and provide real-time hands-on proactive guidance and assistance throughout the year.



Highest Level of Quality

We have maintained the highest level of quality developed from our many years of Big 4 experience. We maintain rigorous quality standards as members of the AICPA Employee Benefit Plan Audit Quality Center.



Staff Dedicated to Benefit Plan Services

Our Partners and staff have vast experience in auditing employee benefit plans of all types and sizes, as each staff member works on numerous plan audits throughout the year. All have maintained the AICPA quality standards and continuing professional education in plan audits. We provide extensive hands-on training to our staff.



A Practical Personalized Approach

All employee benefit plans are not alike. Some are more complex in structure and investment goals, while others are basic. Our audit approach is tailored to fit the structure of your employee benefit plan.



Responsiveness

With a partner actively involved in the day-to-day audit process, you will receive the highest level of attention in a proactive service approach.



A Fair Fee

As a boutique CPA firm, we do not carry significant overhead costs of a larger firm. We work out of one office, with partners, staff and employees each providing hands-on client services. This results in low overhead costs which are passed on to our clients in a reduced fee structure.

What You Will Experience With Us

Our culture gives us the opportunity to provide a collaborative hands-on approach, adding value to your company, resulting in the following:



Trust

Our partners seek to develop a relationship where they know you, your company and your goals to better assist you in achieving business success.



Understanding

We will understand your points of view and how they can be turned into actionable steps. We understand the sense of urgency that is required in today's competitive business environment and will promptly respond to your concerns and inquiries. We recognize that you may not be aware of all laws and industry issues that can impact your employee benefit plans, and we are here to provide those insights and best practices to you.



Partnership

We will become a member of your team to provide the advice, insight and guidance you need for your current and future business activities as well as leveraging on our industry and technical expertise to help you capitalize business opportunities.



Value

Our overall goal is to allow you to harness our expertise to enhance the value of your business.

"Anyone can commit. We will deliver!"



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