

Employee Benefits Services Group



ALPERN ROSENTHAL
INSPIRING OPPORTUNITIES

Capabilities

The Employee benefits Services Group of Alpern Rosenthal is comprised of a team of professionals who have extensive experience in employee benefits matters and are committed to helping clients align their benefits strategies with their bottom line. Our seasoned team of specialists works closely with clients to provide

responsive

creative yet practical solutions that make a difference to our clients.

Our team members work closely with clients to establish and maintain employee benefit programs that optimize tax efficiency and ensure that employees receive the benefits they deserve. At Alpern Rosenthal, we are an innovative firm dedicated to shaping the long-term relationships that have advanced our clients' businesses.

For more information on the Employee Benefits Services Group, call 412.281.2501 or visit us at www.alpern.com/services/employee/index.html.

We offer a broad range of benefits services including:

- **Plan design and implementation** – retirement plans, deferred compensation, cafeteria plans, HSAs, flexible spending accounts and other welfare benefits plans
- **Executive compensation consulting** for tax and ERISA issues – options, stock and insurance based compensation and equity-based plans
- **Consulting on employee benefit tax-savings opportunities**, deferral techniques and cost-saving strategies
- **Assistance with merger and acquisition issues** related to employee benefit plans including due diligence review of retirement plans
- **Compliance reviews** – mini “self audits” to assist employer review of plan documentation and operation to promote compliance with DOL and IRS requirements
- **Liaison services with IRS and DOL** for matters involving plan examinations
- **Third party administration** and recordkeeping services for defined contribution plans, including 401(k) plans, profit-sharing plans, defined benefit plans and ESOPs
- **Preparation of IRS Form 5500**, summary annual reports, and assistance with other reporting and disclosure requirements under ERISA
- **Discrimination testing** – 401(k), 401(m) and 401(a)(4) including cross-testing of “new comparability” retirement plans
- **Fringe benefit plan reporting and taxation**

