

BeachFleischman PC was formed in 1990, and has grown to be one of the largest locally-owned CPA firms in Arizona and a “Top 200” largest CPA firm in the United States. The firm serves private enterprises, nonprofit organizations and entrepreneurs in the U.S., Mexico and Canada, and provides a wide range of accounting, assurance, tax and advisory services.

## Firm Purpose

We passionately believe in the power of collaboration. Working together in pursuit of your success is our purpose and our privilege.

## Services

- Accounting
- Auditing
- Bookkeeping
- Business Valuation
- CFO Services
- Cost Segregation
- Cybersecurity
- Estate Planning
- Forensic Accounting
- Human Capital Management
- International Tax
- Litigation Support
- Marital Dissolution
- Payroll
- Pension Plan Design & Administration
- Federal/State Tax Planning & Compliance
- Strategic & Succession Planning

## Industry Experience

- Auto Dealerships
- Cannabis
- Construction
- Distribution
- Financial & Professional Services
- Healthcare
- Hospitality
- Nonprofit
- Real Estate
- Technology

## Helping Clients

- Save taxes
- Achieve compliance
- Enhance profitability
- Improve accountability
- Preserve wealth

## Serving

- Closely-held businesses
- Individuals
- Nonprofit organizations
- Governmental units

**collaborate forward**<sup>®</sup>

## QUICK STATS

SERVING OVER **7,100** CLIENTS IN THE U.S., MEXICO AND CANADA

ONE OF ARIZONA'S **LARGEST** LOCALLY-OWNED PUBLIC ACCOUNTING FIRMS

A **TOP 200** LARGEST PUBLIC ACCOUNTING FIRM IN THE UNITED STATES

OFFICES IN **TUCSON & PHOENIX**

AFFILIATED COMPANIES:

**Pinnacle Plan Design**

**CONTEMPO HCM**

BeachFleischman PC • [beachfleischman.com](http://beachfleischman.com)

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# Employee Benefit Plan Audit Practice

BeachFleischman's employee benefit plan audit segment offers auditing and consulting services to a variety of retirement plans, including defined contribution and defined benefit. Our 65+ clients include plans that range in size from 100 to 3,000 participants, with net assets between \$500,000 and \$186,000,000. There are many accounting and compliance issues that are exclusive to employee benefit plans. Our portfolio of customized solutions and industry expertise enables us to tailor our services to meet your unique needs and allow you to focus on running your organization.

Our approach to retirement plan audits is not that of a commodity. We view the engagement as a partnership with the plan sponsor, partly to assist in meeting the compliance requirements, but more importantly as a watchdog, looking out for the best interest of the plan's sponsor and its participants. We take audit quality seriously. Despite the fee pressures in the employee benefit plan audit market, we insist on performing each audit in accordance with GAAS, in an effort to help our clients meet their fiduciary responsibilities. Each audit is evaluated based on the size of the plan, complexity of the plan document, organization and availability of participant records, and prior audit experience. We utilize these factors to compute a fee that is fair for the amount of work required to complete the audit in accordance with GAAS.

BeachFleischman is a member of the American Institute of Certified Public Accountants' Employee Benefit Plan Audit Quality Center. This membership provides our firm access to timely information on many legislative, regulatory and technical issues to ensure our clients' employee benefit plan audits are in compliance. We value our clients and are committed to providing the highest level of service by strictly adhering to the Center's Code of Professional Conduct.



## Retirement Plan Resources

Pinnacle Plan Design, a subsidiary of BeachFleischman PC, carefully designs retirement plans tailored to the special needs of companies of all sizes. Pinnacle's experienced team is nationally known for their extensive knowledge of U.S. Department of Labor and Internal Revenue Service regulations applicable to retirement plan design and compliance.

Pinnacle has a team of 21 individuals, including actuaries and professionals with Qualified Pension Administrator (QPA) and Qualified 401(k) Administrator (QKA) designations. These individuals will be available as a resource during the audit process.



## PRACTICE HIGHLIGHTS

**65+**  
**CLIENTS**  
THROUGHOUT  
**ARIZONA**  
& THE SOUTHWEST

PLANS THAT RANGE  
IN SIZE FROM  
**100** TO  
**3,000**  
PARTICIPANTS

.....  
WITH NET ASSETS  
BETWEEN  
**\$500,000** &  
**\$186,000,000**

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