

Why choose Keller & Owens, LLC

Keller & Owens, LLC was founded in 1980. We have been serving employee benefit plans for many years. Keller & Owens, LLC is a member of the AICPA Employee Benefit Plan Audit Quality Center. Membership requires professionals working with employee benefit plans to meet continuing education requirements. Our firm attends local and national conferences relating to employee benefit plan issues. We also have in-house seminars and complete other forms of continuing education. Keller & Owens has a partner dedicated to serving Employee Benefit Plans. Every three years a sample of the audits we complete is subject to review by an outside CPA firm. Our audits must meet the highest standards in order to maintain membership in the Center.

For more information, please contact:

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Serving the Needs of Employee Benefit Plans



Keller & Owens, LLC
Certified Public Accountants

Keller & Owens

SERVING THE NEEDS OF EMPLOYEE BENEFIT PLANS

Keller & Owens, LLC offers a wide variety of assurance and tax services to both small and large employee benefit plans.

Types of Plans We Serve:

- Small plans — less than 100 participants
- Large plans — greater than 100 participants
- Cafeteria plans
- 401 (k) plans
- Money purchase pension plan
- 403 (b) plans
- Defined benefit plans
- Defined contributions plans
- Master trusts
- Single employer plans
- Multi-employer plans
- Multiple employee plans
- Health and welfare plans

Assurance

Plans with more than 100 participants are required to attach an audit report to Form 5500 and submit it to the Department of Labor. Keller & Owens, LLC can complete a limited or full scope audit depending on the plans needs. In addition to our audit report each plan will receive a Comments and Recommendations letter that will provide suggestions for internal control and other improvements. During our audit, Keller & Owens, LLC will also review compliance with Department of Labor and IRS regulations. Each audit is tailored to your specific plan type and organization.

“My organization has benefited from the audit and tax services of Keller & Owens for many years. Their experience and insight into the unique issues we face enable them to contribute to our mission.”

-CEO, Medium-size organization

Tax Services

Keller & Owens, LLC can prepare the following tax forms for all types of employee benefit plans:

- Form 5500 and Summary Annual Report
- Form 5330, Excise Tax Return
- Form 990



For more information about the services we offer or the experienced professionals serving employee benefit plans, ask us

or visit our website at
www.kellerowens.com

The Important Plus