



EMPLOYEE BENEFIT PLANS PRACTICE

HoganTaylor's Employee Benefit Plans (EBP) Practice is one of the largest and most experienced in the Oklahoma and Arkansas region. Our clients tell us we meet or exceed their expectations for timely and remarkable service. We are proud to say that we completed, on time, more than 175 employee benefit plan audits and approximately 400 Form 5500 filings last year. It is not just great on-time service that sets us apart; HoganTaylor is passionate about employee benefit plans and possesses the experience and industry-specific knowledge to assist you with your EBP needs.

A DIFFERENT APPROACH

Because of regulatory requirements and the involvement of multiple service providers, it is necessary for EBP audits to be coordinated with multiple parties. HoganTaylor's unique approach significantly reduces the work load and time pressures our clients experience in meeting the Department of Labor (DOL) and Internal Revenue Service (IRS) reporting requirements.

- We work directly with your service providers, third-party administrator (TPA), and others to make information requests less cumbersome for you. The result is improved efficiency and communication with all involved throughout the process.
- We offer secure portal technology enabling you, TPAs, service providers, and others to upload files directly, enhancing the security of your confidential information.
- Our demands on your time are minimized, as we perform the majority of required testing in our office, leaving you more time to do your job and reducing our time in your office.
- Audit reports are generally issued within weeks, not months, upon completion of fieldwork. We value timeliness and help you avoid costly penalties as a result of untimely reporting.
- Because we offer our employees a challenging and rewarding career and a balanced lifestyle, we are generally able to provide service team continuity.
- Our EBP team receives specific EBP training, which means you work with experienced EBP team members.
- We are passionate about EBP audits and have a dedicated team the services HoganTaylor EBP clients.

OVERVIEW OF SERVICES

Our expertise includes employee benefit plans of various structures and sizes, including but not limited to:

- 401(k) plans
- 403(b) plans
- Pension plans
- 11-K filings
- ESOPs
- Health and welfare plans
- Return preparation (Forms 5500, 8955-SSA, 720, etc.)
- Assistance with late filings through the DOL's Delinquent Filer Voluntary Compliance Program

OUR TEAM. YOUR TEAM.

HoganTaylor is not only PCAOB certified and able to handle public company plans, but is also a charter member of the American Institute of Certified Public Accountants (AICPA) EBP Audit Quality Center. Moreover, HoganTaylor has a team dedicated to our EBP Practice. Because our turnover is very low, our dedicated team has strong technical skills, industry experience, and an extensive understanding of plan compliance requirements.



AICPA[®]
EBPAQC Member

Our senior team members attend the AICPA National Conference on Employee Benefit Plans each year, staying abreast of current issues affecting your plans. Further, key EBP team members are speakers at this conference. Throughout the year, our team members consult with the AICPA EBP Audit Quality Center members, ERISA attorneys, and DOL and IRS resources for quick responses to issues as they arise.

EMPLOYEE BENEFIT PLANS MANAGEMENT TEAM



Gwen Stoute, CPA
EBP Practice Leader
and Assurance Partner

HoganTaylor's EBP practice is led by Gwen Stoute, who has more than 20 years of experience in public accounting. She oversees a team of approximately 30 professionals dedicated to assisting clients with their benefit plan needs. Gwen was instrumental in developing the HoganTaylor EBP audit methodology, focusing on regulatory compliance and auditing standards. Gwen is a Summa Cum Laude graduate of the University of Arkansas. She is a member of the AICPA, serving on the AICPA National Conference of Employee Benefit Plans planning committee and the AICPA Employee Benefit Plan Audit Quality Center's Executive Committee. Gwen is also a member of the Arkansas and Oklahoma Societies of Certified Public Accountants and the Southwest Benefits Association. Gwen has presented on various EBP related topics at numerous conferences, including the AICPA National Conference of Employee Benefit Plans.



Tracy Harrelson, CPA
Assurance Partner

Tracy Harrelson has more than 20 years of experience in public accounting and in industry. At JPMS Cox, PLLC, she served most industries within the assurance department including manufacturing, health care, construction, real estate and HUD properties and nonprofit organizations. Tracy specializes in employee benefit plan services and has technical experience with all types of plans, including defined contribution plans, defined benefit plans, and health and welfare plans. Tracy also led the third-party administration for employee benefit plans which included plan design, participant recordkeeping, discrimination testing and Form 5500 preparation. While at Ernst and Young LLP, she managed the Arkansas employee benefit plan audit practice and served several SEC clients.



Natasha Lundy, CPA
Assurance Senior Manager

Natasha Lundy has more than 12 years of experience providing assurance services to clients in the EBP industry. As a member of HoganTaylor's EBP management team, Natasha conducts extensive in-house training specific to accounting and auditing procedures for EBP audits. Natasha graduated from Northeastern State University with a Bachelor of Business Administration with an emphasis in Accounting. Natasha is involved in various community organizations and currently serves as the Treasurer of the Tulsa Employee Benefits Group Steering Committee. She is a member of the American Institute of CPAs (AICPA), the Oklahoma Society of Certified Public Accountants, and attends the annual AICPA National Conference of Employee Benefit Plans.

ABOUT HOGANTAYLOR

HoganTaylor is one of the largest business advisory and public accounting firms in Oklahoma and Arkansas. In addition to Employee Benefit Plan services, HoganTaylor has many other practice groups made up of knowledge experts in important, highly specialized areas of accounting.

SERVICES

Accounting Solutions	Litigation Support
Advisory	Outsourced CFO Services
Assurance	Risk Assurance
Business Valuation	Tax
Employee Benefit Plans	Technology
Human Capital	Wealth Management

INDUSTRIES

Collective Investment Funds	Nonprofit
Construction	Retail
Energy	Transportation
Financial Institutions	
Insurance	
Manufacturing & Distribution	

PRIMEGLOBAL

HoganTaylor is an independent member firm of PrimeGlobal, one of the five largest associations of independent accounting firms in the world. As an independent member, HoganTaylor has access to a wide range of PrimeGlobal tools and resources around the globe.



CONTACT INFORMATION

For additional information about HoganTaylor's Employee Benefit Plan services, please contact Gwen Stoute at 479.856.6920 or gstoute@hogantaylor.com.



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