



CREATING THE BEST SOLUTION FOR YOUR BUSINESS & EMPLOYEES

EMPLOYEE BENEFIT PLAN SOLUTIONS FOR ALL

At Blue & Co., LLC, our employee benefit plan group provides customized solutions for companies and plans of all sizes across the United States. Our benefit plan group includes professionals who spend 100% of their client service time performing benefit plan audits.

Annually, this team completes 225 employee benefit plan audits. This puts us in the top tier of firms who focus on employee benefit plan audits as a significant practice area. The team has experience working with 403(b), 401(k), profit sharing, ESOP, pension, single employer, multi-employer, and health and welfare plans.

Qualifications:

- Internal department that provides return preparation services (Form 5500, 990s, etc).
- Personnel who volunteer within the AICPA EBP Group.
- Focus on performing high-quality, efficient audits while striving to minimize disruptions to client staff.
- Internal group that performs payroll audits for multi-employer plans.

Quality Control:

- Member of AICPA Employee Benefit Plan Audit Quality Center.
- External peer review performed every three years with Pass rating received.
- Internal inspection performed annually.
- Dedicated firm-wide quality control department.

Training:

- Annual attendance at the AICPA National Employee Benefit Plan Conference.
- Annual internal training for all personnel serving employee benefit plans.

For more information, please visit www.blueandco.com/contact or contact Debora Herbert at dherbert@blueandco.com.

ABOUT BLUE & CO., LLC

Blue & Co., LLC was founded in 1970 and is an independent accounting and advisory firm with more than 450 people in 10 offices across Indiana, Ohio, and Kentucky.

With more than 50 years of experience, Blue & Co.'s public accounting expertise includes the practice areas of assurance, cybersecurity and data management, tax compliance and consulting, healthcare consulting, benefit plan services, pharmacy benefits consulting, valuation and litigation support, and business services. Its industry specializations include healthcare, construction, nonprofit, manufacturing & distribution, technology, financial services organizations, and agribusiness.

Blue & Co. is annually recognized on the Best Places to Work lists in Indiana, Ohio, and Kentucky, and is ranked within the top 60 largest firms in the United States.

For more information, visit us on our website at www.blueandco.com.

BLUE BENEFITS CONSULTING

Blue Benefits Consulting, Inc., is an affiliate of Blue & Co., LLC and provides services in the areas of retirement plan administration, plan design and consulting, and filing of corrections with the IRS and DOL. This affiliation gives the Employee Benefit Plan team close access to experts who can assist with various plan issues that may arise.

For more information, visit us on our website at www.bluebenefits.com.



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