



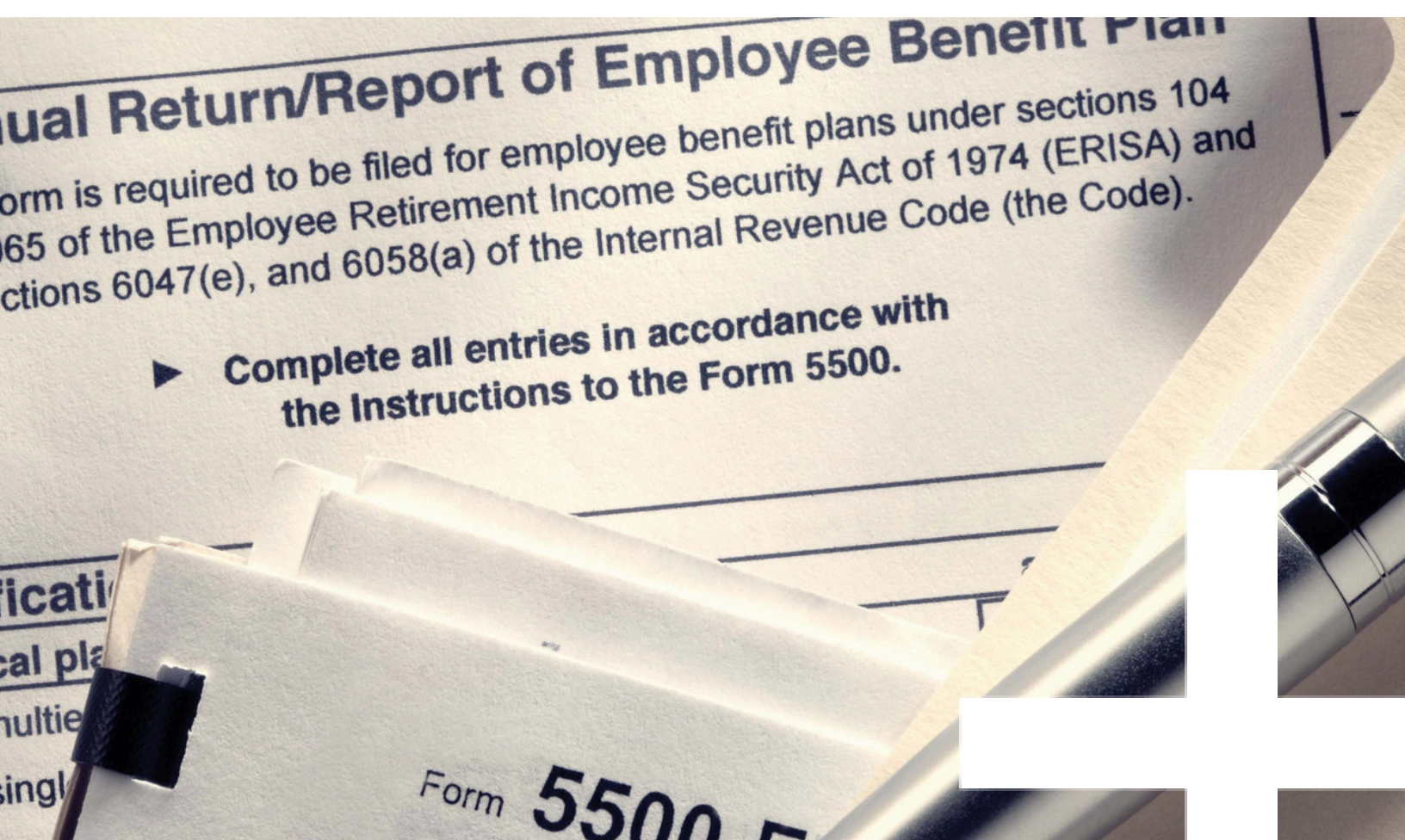
HENRY & PETERS

CERTIFIED PUBLIC ACCOUNTANTS | EST. 1929

Tyler | Longview | Frisco

Texas-based CPA Firm.

Tax, Audit, Client Accounting Services, Advising
Employee Benefit Plans



More Than Accounting.

Deeper Experience. More Trust.

More than 60 years of deep, direct experience in the field—especially with employee benefit plans— provides the familiarity and practical understanding of audit, tax, advising and client accounting services that can make Henry & Peters a trusted partner in your success.

Integrated Support.

More than 60 employee benefit plans of all sizes are dependent on Henry & Peters. Our clients depend on us for our professional accounting services, and for our intimate understanding of day-to-day operations and industry issues.

Beyond helping you maintain compliance and manage costs, we offer integrated, year-round support with a perspective to ease the strain on your staff and help make more sense of where your business is headed.

- + Financial statement audits
- + Tax preparation (Forms 5500 and 8955-SSA)

Our professionals provide a wide variety of employee benefit plan services and have significant experience with virtually all plan types and filing requirements:

- + Defined contribution retirement plans (thrift or savings plans including 401(k) and 403(b), profit-sharing, money purchase pensions, stock bonus and employee stock ownership, and certain target benefit plans)
- + Defined benefit pension plans (pension equity, cash balance plans)
- + Multiemployer plans
- + Pooled Employer Plans (PEPs) Group of Plans (GoPs)
- + Health & Welfare plans
- + Firemen's Relief and Retirement Fund plans
- + ERISA Section 103(a)(3)(C) Audits

Employee Benefit Plan Intelligence.

Henry & Peters fields a team of more than 130 employees with diverse backgrounds and experience in national, regional, and local accounting firms, as well as in various positions in the industry. We have built a wealth of employee benefit plan-specific knowledge through training and from our many years of service to our clients. We have employees that regularly attend local and national conferences in addition to annual training. Henry & Peters and our engagement personnel have the requisite skills, enthusiastic attitude, and personal commitment to successfully serve you well – not only now, but in the years to come.

Engagement personnel have extensive knowledge in the following matters:

- + Centralized & decentralized accounting & HR environments
- + Mergers, acquisitions, plan spin-offs
- + Hard-to-value investments
- + Current & pending regulatory & accounting pronouncements
- + Partial plan terminations
- + Initial audits & stub period audits
- + DOL & IRS investigations
- + ERISA compliance matters
- + Various DOL & IRS correction programs



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Employee Benefit Plan Audit
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