



B O U L A Y

Employee Benefit Consulting and Administration



Establishing an employee benefits program that meet the needs of the employer as well as the employees can be a difficult task. The right retirement and benefits plan can impact your recruiting and retention results, which is why it is important to tailor such services to your organization. This is critical to the success of your business. You need qualified, professional assistance when planning, searching, and negotiating benefits.

How we help you get there

We design, implement, administer, and monitor the following:

- 401(k), safe harbor 401(k), profit sharing, cross-tested profit sharing and other retirement plans
- Employee stock ownership plans (ESOPs)

Some of the additional services we provide for your qualified plan include:

- Accounting, including income and contributions allocation, and financial statement preparation
- Discrimination testing for 401(k) plans, top heavy, and other testing
- Employee enrollment meetings
- Individual plan participant statements
- Assistance with participant distributions
- Form 5500 and related schedules
- Summary annual reports
- IRS forms reporting distributions to participants
- Participant loan accounting, including interest computation, preparation of promissory notes, and payments monitoring
- Financial statement audits for large employer plans

We specialize in developing programs that meet your needs. Our services do not stop after implementation. We continue to monitor and analyze your benefits program and make recommendations that keep you current, competitive, cost-effective, and in full compliance with regulatory requirements. Contact Boulay to fulfill all your employee benefit consulting and administration needs at learnmore@boulaygroup.com.