



# Employee Benefit Plan Audits

ASSURANCE. PARTNERSHIP. TRUST.

Looking for an experienced, collaborative advisor? We've been growing alongside businesses since 1973. Provide confidence to plan sponsors, participants, and regulators with an EBP audit, which shows that plan management aligns with ERISA and regulatory standards. Let Grimbleby Coleman ensure the compliance and accuracy of your plan audit, while also delivering insights and guidance...all with ease. Contact us today to get started.



**Doug DeBoer, CPA**  
Principal | Audit & Assurance



**Megan Stambaugh, CPA**  
Manager | Audit & Assurance

## Why partner with us for your EBP audit?

- + **Proactive**, problem-solving and plain-English approach
- + **Approachable**, responsive team ready to provide guidance
- + **Transparent** pricing with no surprise fees
- + **Direct** collaboration with your third-party administrator
- + **Flexible** remote or in-person audits based on your preference
- + **Secure**, user-friendly technology for data sharing



# Expertise Beyond the Numbers

Our Audit & Assurance services provide more than just compliance — we deliver audits that provide clarity and confidence. Our specialized Employee Benefit Plan (EBP) team stays up to date on evolving regulations to ensure your plan complies with the latest requirements. With strong experience auditing 401(k) and profit-sharing plans, Employee Stock Ownership Plans (ESOPs), and defined benefit plans, we deliver accurate insights to support informed decision-making and solve business challenges.

We've proudly served the Central Valley and beyond since 1973, specializing in agricultural and construction accounting and offering services in Audit & Assurance, Tax, Business Advisory, Client Accounting, Estates & Trusts, and Wealth Management. Let's build and grow a lasting partnership together.

## OUR PROCESS

### Phase 1: Planning



- + We begin with a seamless onboarding process tailored to your needs.
- + Document requests are shared through our secure and user-friendly platform.

### Phase 2: Fieldwork



- + Our team makes testing selections and provides clear requests.
- + Testing takes place either remotely or on-site, depending on your preference.
- + Timely follow-ups address any questions or outstanding items.

### Phase 3: Delivery



- + Draft financials are delivered for your review with clear guidance.
- + Finalized reports are presented with actionable recommendations and industry insights.

## RECOGNITION & AFFILIATIONS



As members of the Employee Benefit Plan Audit Quality Center (EBPAQC), we are required to maintain many quality-focused policies beyond what is required for non-member audit firms.



Grimbleby Coleman is proud to be recognized as an Inside Public Accounting (IPA) Top 400 Firm.



In 2023, Grimbleby Coleman was recognized as an IPA Fastest Growing Firm in the United States.



A BDO Alliance member, we have bench strength beyond our regional firm in Tax, Tax Credits, Business, Sales, Mergers, and Acquisitions, ESOP purchases, and more.



### Contact us.

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### Call, click, or visit.

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