WHY PARTNER WITH BROWN EDWARDS?

Experience

- 50+ years
- 97% client satisfaction
- specializing in 12 industries

Our commitment to our clients, along with our hard-earned reputation for quality service, has earned us a 97% client satisfaction rating. We work with you to address your needs and help you plan for what lies ahead.

INDUSTRIES SERVED

- Wholesale/E-Commerce Distribution
- Not-For-Profit Organizations
- Construction/Contractors
- Real Estate Development
- Government Contractors
- Education (K12 + Higher Ed)
- Financial Institutions
- Dealerships
- Benefit Plans
- Credit Unions
- Manufacturing
- Health Care
- Energy
- Retail

Size

- Full service firm
- 12 office locations
- 450+ employees

Size matters! A larger firm has the resources to allow team members to develop specialized skills and gain industry-line experience.

With offices throughout the mid-Atlantic region and more than 450 employees, we are able to better serve you by being a part of your community.

OFFICE LOCATIONS

- Bluefield, WV
- Bristol, VA
- Charleston, WV
- Harrisonburg, VA
- Kingsport, TN
- Lynchburg, VA
- New River Valley, VA
- Newport News, VA
- Petersburg, VA
- Richmond, VA
- Roanoke, VA
- Wytheville, VA

BROWNEDWARDS@BECPAS.COM | (276) 466-5248

YOUR SUCCESS IS OUR FOCUS.

RETIREMENT PLAN SERVICES

EXPERIENCE MATTERS

Our Retirement Plan Services Group provides a full range of retirement plan administration services, including plan design, document preparation, and annual administration in coordination with your own legal and financial advisors. Whether you are thinking about starting a new retirement plan or want to optimize your existing plan, our open architecture platform combined with extensive plan design, fiduciary insights, and regulatory expertise can alleviate much of the administrative burden and cost while maximizing allowable contributions.

SERVICES OFFERED

DESIGN

- Defined Contribution and Defined Benefit Plans
- Cross Tested/New Comparability Plans
- ESOPs

DOCUMENTATION

- Plan and Trust Documents
- Summary Plan Descriptions
- Plan Administration Packets
- Funding and Investment Policies
- All Annual Notices

ANNUAL COMPLIANCE/REVIEW

- Review plan status with your Investment Advisor, CPA and Attorney
- Controlled Group Issues
- Legislative and Regulatory Developments
- Prohibited Transaction Reviews

ADMINISTRATION/COMPLIANCE

- Eligibility/Participation/Vesting of Participants
- Contribution calculations
- Nondiscrimination and other testing (including cross tested/new comparability methods)
- Allocation of earnings
- Benefit distributions and tax withholding requirements, lost participants
- Governmental filings—Forms 5500/1099-R
- Participant disclosures
- Surety bond compliance
- Participant loans and hardship distributions
- Beneficiary designations

"Dan and his team have been a great partner over the years. Their confidence and level of expertise has made it easy for us as a small business to manage our retirement plan. It's been a pleasure to work with them."

SHANNON CONNORS
Chief Operating Officer, NWG Solutions