

Successfully Represented a Client During a Department of Labor Audit of its 403(b) Contribution Plan

Amundsen Davis successfully represented a client during a Department of Labor audit of its 403(b) defined contribution plan. We advised on and assisted with the correction of operational errors under the Internal Revenue Service Employee Plans Compliance Resolution System to bring the plan into compliance and maintain the plan's tax-qualified status. We then worked with the client to develop appropriate administrative procedures and oversight to reduce the risk of future operational errors.

PROFESSIONALS

Kelly Haab-Tallitsch
Partner

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