Employee Benefit Services

WINDES
AUDIT | TAX | ADVISORY

Committed to Service

Our Employee Benefit Services professionals are dedicated to providing complete retirement plan administrative and consulting services to both our accounting clients and outside clientele. We hold the information our clients entrust to us in the strictest confidence. Although our Employee Benefit Services is part of a regional accounting firm, we do not market accounting services to non-accounting clients. We work closely with existing advisors to provide the teamwork needed for successful administration of their clients' retirement programs.

Personalized Attention

Our goal is to deliver the highest quality administrative and consulting services to our clients and their advisors. Our clients have direct contact with their plan administrators and each receives personalized service from our experienced professionals.

Retirement Plan Administration

Windes Employee Benefit Services provides complete design, documentation, and administration services for employee benefit plans sponsored by small to medium-sized businesses including:

- Defined Benefit Pension Plans
- Cash Balance Plans
- Pension, Profit Sharing, and 401(k) Plans
- Cross-Tested Plan Allocations
- Safe-Harbor 401(k) Plans
- 403(b) Plans
- Cafeteria Plans
- Welfare Benefit Plans

Other Services

In addition to complete Third-Party Plan Administration, we offer the following services:

- Feasibility Studies and Employee Surveys
- Plan Design Consultation
- Compliance Reviews
- Non-Discrimination Testing
- Government Correction Program Filing
- Distribution Planning
- ERISA Audits
- Non-Qualified Plan Design and Administration
- Represent Clients Before the Internal Revenue Service (IRS)

Windes sponsors IRS-approved volume submitter plan documents for:

- Defined Benefit Pension Plans
- Money Purchase Pension Plans
- Profit Sharing Plans
- 401(k) Plans

Professional Memberships

- American Society of Pension Professionals and Actuaries (ASPPA)
- National Institute of Pension Administrators (NIPA)
- American Institute of Certified Public Accountants (AICPA)
- California Society of Certified Public Accountants (CalCPA)

Experienced Professionals

With over a century of combined experience in the employee benefits field, our professionals have the expertise and access to leading edge resources that uniquely qualify us to provide our clients with complete administrative services that ensure the successful operation of their employee benefit programs. Our professionals have earned nationally recognized professional designations and are enrolled to practice before the IRS. We take extensive continuing education courses annually to stay up to date on the latest developments in our field.

Therese S. Cheevers, APA, ERPA

Partner and Department Chair, Employee Benefit Services | tcheevers@windes.com

- In practice since 1984
- Accredited Pension Administrator (APA) and IRS Enrolled Retirement Plan Agent (ERPA)
- Specializes in retirement plan consultation, design, administration, compliance, and corrections
- Practice focus is pension plans, cross-tested profit sharing plans, and IRS reporting to middle market corporations and unincorporated entities

Richard L. Green, CPC, QPA, QKA, APA, ERPA

Retired Partner | rgreen@windes.com

- In practice since 1981; Department Chair 2008 - 2019
- Certified Pension Consultant (CPC), Qualified Plan Administrator (QPA), Qualified 401(k) Administrator (QKA), Accredited Pension Administrator (APA), and IRS Enrolled Retirement Plan Agent (ERPA)
- Specializes in retirement plan consulting, design and administration, including defined benefit and cash balance plans, and non-qualified and welfare plan design and consulting

Connie Lee, CPC, QPA, QKA

Senior Manager | clee@windes.com

- In practice since 2000
- Certified Pension Consultant (CPC), Qualified Plan Administrator (QPA), and Qualified 401k Administrator (QKA)
- Specializes in qualified plan issues, plan qualification, and non-discrimination testing
- Practice focus includes 401(k) plans, safe harbor and defined contribution plans, defined benefit plan design and administration, plan compliance and correction, and IRS reporting.

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