

Pension Assurance is a Single-Service CPA Firm With One Service Offering: **ERISA** Retirement Plan Audits

The Vision for Creating Pension Assurance

came from recognizing that ERISA plan audits are typically just one of many service offerings within full-service accounting firms. This lack of dedicated focus shows up in problems with client service and audit quality throughout the industry.

Pension Assurance is becoming the go-to firm for retirement plan audits. As plans are subjected to ever greater regulatory scrutiny, the value of a firm like Pension

Assurance has never been greater. We bring top-shelf expertise at highly competitive fee levels.

Today, plan sponsors are beginning to recognize this value. In 2025, we were one of the fastest growing ERISA plan audit practices in the country, auditing about 1,000 plans, constituting \$35 billion in plan assets and over 713,000 participant accounts. Time and again, our focused, proven approach has clients and their service providers consistently praising our team and audit process.



A Few Things That Make Pension Assurance Special



We're a 100% Specialized Firm

This means we only hire audit professionals who are ready to commit to a 100% retirement plan focus.



It's Always Training Season

We rigorously train our associates all year round — yielding an entire firm of experts who know EBP audits inside and out.



Uninterrupted Client Focus

We have no competing priorities during tax season, or impending corporate filing deadlines, so we stay focused on our clients all year round.



Unparalleled Value

Our audit fees are consistently competitive, thanks to our experienced and expert team.

Our Business Model Follows Simple Math:

Industry-Leading Expertise



Industry-Leading Client Service



Reasonable Fees

- ✓ Shorter Audits
- ✓ Stronger Audit Team
- ✓ Superior Quality
- ✓ Excellent Partner-to-Client Ratio
- ✓ Your Peace of Mind

Our Stats for 2025

1,000

Audits performed

\$35B

In total plan assets

#12

12th Largest EBP Audit Firm in the Nation

70+

Professionals dedicated to plan audit excellence

11

Seasoned partners

PARTNERS



Pension Assurance

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