



*The New York Metro Area Chapter invites you to attend...*

### **Employee Benefit Plan Audit Readiness**

Employee benefit plan audits are an essential part of any employer's benefits program. Please join us as our speakers, Bob Hamilton and Michael Belonio of BDO, discuss how to prepare for an audit of your employee benefit plan, including:

- Common Plan Operation Failures
- Annual Audit Process – Are You Ready?
- Regulatory Updates

#### **Bob Hamilton**

##### **Director-Employee Benefit Plan Audit Practice, BDO**

Bob Hamilton is the Director of BDO's New York Employee Benefit Plan Audit Practice. With more than 25 years of professional experience, Bob is responsible for a majority of our largest and most complex audit engagements for employee benefit plan clients. In addition to financial statement audits and tax compliance services, some of the specialized projects he has performed for these clients include the review and agreed-upon procedures report on the allocation of expenses, cash management and control evaluations, the implementation of formal budgeting and reporting processes and major operational audits of various reporting cycles. Bob has also worked on the resolution of complex DOL and IRS issues/audits.

#### **Michael Belonio, CPA**

##### **Audit Senior Manager-Employee Benefit Plan Audit Practice, BDO**

Michael Belonio has 9 years of experience serving in the US and 12 years of total public accounting experience. He has extensive professional experience in performing financial statement audits of multi-employer and single employer plans including health and welfare plans, defined benefit pension plans, and 401(k), 401(a), and 403(b) plans. His experience includes resolving complex issues surrounding the valuation of investments, plan benefit obligations, benefit calculations, withdrawal liability and contributions among others. He is also experienced in the preparation and review of Form 5500, the SAR and the Annual Funding Notice (AFN). Michael performs the detailed review of the client's financial statements and regulatory filings. He is involved in resolving audit issues with clients and the audit engagement team. Michael relocated to New York in 2007 after beginning his public accounting career with the Financial Services Group of PricewaterhouseCoopers Philippines in early 2000.

**Date:** Tuesday, February 28, 2017

**Time:** Registration check-in begins at 8:30 AM

**Presentation / Q & A from 8:45 AM – 10:00 AM**

#### **Meeting Location and Directions:**

BDO, 100 Park Avenue, 11th floor (at 41<sup>st</sup> Street)

#### **Directions**

Take the 4, 5, 6, 7, or S to Grand Central/42<sup>nd</sup> Street

**NOTE: Photo ID and pre-registration are required to enter the building!**



# Online Registration Form

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## Employee Benefit Plan Audit Readiness

### **[REGISTER HERE](#)**

To attend you must register by **Friday, February 24, 2017 (5 PM)**

Attendees of this event will receive 1.0 hour CEBS CPE credit.

**This event will also be eligible for 1.0 hour of HRCI credit, pending approval by the HCRI, and 1.0 hour of SHRM PDC credit, pending approval by SHRM.**

**Members who have registered for this event and are not able to attend, please notify us no later than 5:00 PM on Friday, February 24, 2017. Non-members who are not able to attend must notify us by this date to receive a refund.**

#### **NY Metro Area Chapter Meeting Costs:**

Member – Free

Non-Member – \$30 Fee\*

*\* A CEBS student who pays for two monthly education sessions during the calendar year will gain NY Metro Chapter membership for the remainder of the year.*

#### **Payment for non-members of the NY Metro Chapter:\***

- Via PayPal, you will be taken to the payment page once you [register](#) for the event on our [website](#).

\*Please note that the NY Metro Chapter will no longer accept payment by check during registration on the day of the event. **All non-members must pay through PayPal.**

**The NY Metro Chapter of ISCEBS is now accepting online [registrations](#). Please contact Sue Andres if you have any questions or feedback regarding the new registration process:**

E-Mail: [support@cebsnyc.org](mailto:support@cebsnyc.org)

Telephone: (718) 705-4263

**For questions about the program, please contact Marie Villeneuve or Gregory Hankins:**

E-Mail: [education@cebsnyc.org](mailto:education@cebsnyc.org)

Telephone: (646) 801-8793

*Sponsored by the New York Metropolitan Area Chapter of the International Society of Certified Employee Benefit Specialists (ISCEBS), a nonprofit organization that serves as an educational resource for certified employee benefit specialists and others in the employee benefits community.*

