

KEY CONSIDERATIONS FOR EMPLOYEE BENEFIT PLAN MANAGERS DURING M&A

New Video Featuring Brenda DeSaro of EisnerAmper Provides Four Steps toward Successful Plan Migration

In the latest in a series of employee benefit plan videos from EisnerAmper, senior manager, Brenda DeSaro, provides four simple steps that benefit plan managers need to keep top of mind before, during and after a merger or acquisition. The video is intended to help answer a basic question:

“What happens when an employer is considering an acquisition of a company with an employee benefit plan?”

Brenda’s four steps include:

- 1) Acquire all the necessary documents from the company being acquired and maintain them in a place easily accessible by management
- 2) List all third party providers for the plan at the company being acquired including detailed contact information
- 3) Engage in detailed conversations with the plan decision makers on what will be done with the plan once the company is acquired
- 4) Communicate with all the parties to create and share a reasonable timeline of who does what and when.

According to DeSaro, “Collecting key documents is critical but more so is early and consistent communications with plan managers emphasizing the time frame along with roles and responsibilities.”

In addition to the four steps noted, we encourage you to download a comprehensive checklist of plan acquisition considerations by clicking [here](#).

For more information on all aspects of employment benefit plan audits and advisory services, contact [Brenda DeSaro](#).

About EisnerAmper:

EisnerAmper LLP is a full service audit, tax and advisory firm and one of the largest in the nation, with a practice group specifically dedicated to the employee benefits industry. The firm currently audits more than 400 employee benefit plans annually and works closely with plan sponsors to educate them on benefit plan issues such as internal controls and other best practices for plan compliance.