

SESSION

September 21st, 2017

11:30am – 1:00pm

Cottonwood Grille

913 W River St.

Boise ID 83702



President: Kelly Belden, Empower Retirement
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Form 5500 Updates, Proposals and Common Audit Deficiencies

Rachel A Pulliam, CPA – Pulliam & Associates, Chtd.

In this session, Rachel Pulliam, CPA will discuss Form 5500 updates and proposed changes. She will also discuss common large plan audit deficiencies.

Lunch will be served.

Registration for the event closes on Friday, September 15, 2017

Register at www.wpbchoise.org

About Our Speaker:

Rachel Pulliam, CPA has worked in the public accounting industry since 1999. She received her Bachelors of Science in Agricultural Economics from the University of California, Davis. Rachel’s areas of concentration includes Form 5500 large plan audits. She is currently a member of the American Institute of Certified Public Accountants (AICPA) and the Idaho Society of Certified Public Accountants (ISCPA). Rachel is also a member of the ISCPA Peer Review Committee and her firm is a member of the AICPA Employee Benefit Plan Audit Quality Center.

Rachel is originally from Boise, ID and is married with two children. She spends most of her free time coaching and playing soccer. When she is not on the soccer field you can find her volunteering for the St. Luke’s Children’s Hospital as a member of the Kid for a Night Steering Committee.

You may also mail this registration form and payment to Patricia Zurfluh, WP&BC, 2289 S Bonito Way, Meridian, ID 83642

Members Attending: _____ @ \$25 per person*

Non-Members Attending: _____ @ \$45 per person*

Name(s): _____

Company/Organization: _____

Email : _____ Phone: _____

Lunch will be served.

*All cancellations must be received at least 3 days prior to the event. If a cancellation is timely received, the attendee will receive a refund, less a \$10 processing fee. If a cancellation is received less than 3 days prior, the attendee will not receive any refund.