

COMPLICATED CASES CALL FOR GOLDFLEAF CONSULTING

Our credentialed professionals have years of industry experience and are just a phone call away, ready to answer your questions, review your plan, assist with any errors, and more.

What kind of cases do we handle? *All kinds!* Below is a recent example.

THE SITUATION

A client was assessed penalties from the IRS for late filing Form 5500 for several years. Upon investigating with the client and the IRS, Goldleaf found there was an issue with the EINs used in the filings, and the Forms 5500 were *not* filed late.

FINDING A SOLUTION

Goldleaf Partners stepped in and communicated with the IRS on behalf of the client. After several discussions with the IRS and sending a letter to request an abatement of penalties, the IRS dropped the penalties and the client owed nothing.



FROM THE CLIENT..

"I am so grateful to you. Thank you for your professionalism, follow-ups, and tenacity."

Goldleaf Partners is not a law firm and does not provide legal advice. This material is informational only, and is not intended to provide any legal advice. Goldleaf Partners consulting services are offered separately from standard retirement plan administration.