



Building your future

Thank you for considering Burr, Pilger & Mayer for your pension audit needs. In order to draft a proposal for you, we will need the following information:

- Plan Summary Document
- All Plan Amendments
- Most Recent Quarterly Net Assets Statement
- Prior Year Audit Report (if applicable)
- Prior Year 5500
- Third Party Administrator contact information

Name	Title	Company	Telephone
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- Investment Advisor contact information

Name	Title	Company	Telephone
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Please send the information detailed above to:

Pension Audits
 Burr, Pilger & Mayer
 600 California Street, Suite 1300
 San Francisco, CA 94108

Once again, thank you for your interest in Burr, Pilger & Mayer, LLP. We will send you a proposal within two weeks of receiving all of the information requested on this checklist.

Member of The Leading Edge Alliance