

Lisa Whelan-Wrench, CPA

Manager, Assurance

Walnut Creek
2001 North Main Street, Suite 360
Walnut Creek, California 94596

**Overview**

Lisa has over twenty years of experience providing auditing and advisory services to all types of employee benefit plans, including 401(k), Profit Sharing, 403b, ESOP, Defined Benefit and Health and Welfare plan. She has been a team member on multiple employee benefit plan audit internal inspections and peer review engagements. She has developed and delivered training for employee benefit plans, including being a facilitator for the AICPA Employee Benefit Plan Audit Workshop.

Lisa Whelan-Wrench holds an active CPA license in California.

Interesting Tidbit

Lisa spends all her free time with her best pals and rescue mutts – Sunshine, Daisy, and Brutus.

Community

- Member – California Society of CPAs (CalCPA)
- Member – American Institute of Certified Public Accountants (AICPA)

Certification

Certified Public Accountant (CPA)

Services

Audit
Employee Benefit Plan Audit

Education

BA/Accounting – Sonoma State University