



Allied Experts – Qualified Plan Administration



Geoffery H. Ewertz, CPA

Geoff has consulted in the qualified retirement plan area since 1981. He has been involved in the design, installation, administration and termination of over 4,000 plans. He has lectured throughout the state on qualified retirement plans for the California Certified Public Accountants Education Foundation.

He wrote and taught courses on retirement plans for the Foundation, including:

Qualified Retirement Plans:

- Maximizing Tax Benefits
- Dealing With Problems In Pension and Profit Sharing Plans
- Retirement Plan Consulting Issues

He has also lectured at various professional seminars on the subject of qualified retirement plans. Member of the American Institute of Certified Public Accountants; Member of the California Society of Certified Public Accountants; Member of the Tax Division of the American Institute of Certified Public Accountants, specializing in employee benefits.