



# ANNE MORRIS



## EXPERIENCE

With nearly 20 years of public accounting experience, Anne specializes in not-for-profit and employee benefit plan audits. She is an integral part of the firm's assurance practice and is the Assurance Leader of the Not-for-Profit Services Practice and Employee Benefit Plan Practice at Windham Brannon.

She works closely with clients during the planning phase of an audit in order to identify potential issues as early as possible, thereby ensuring that the process is effective, efficient, and completed in a timely manner. She regularly communicates with her clients to help them answer any questions that may arise during the course of the year.

Anne has presented to many not-for-profit clients' board of directors and audit committees to discuss the company's audited financial statements as well as any important matters that arose during the audit. Anne has also presented to various non-profit groups about emerging issues in the non-profit arena.

She has served as the chairperson for the Georgia Society of Certified Public Accountants Employee Benefit Plan Conference and as a member of the AICPA & CIMA Employee Benefit Plans Conference Planning Committee. She has been a frequent speaker at the AICPA National Employee Benefit Plan Conference.

Additionally, Anne is regularly invited by the board of directors of her benefit plan clients to present findings from their audits as well as other industry specific topics.

### **Specialties:**

- 401(k) plans
- 403(b) plans
- pension plans
- SEC Form 11-K filing requirements

## PROFESSIONAL ASSOCIATIONS

- American Institute of Certified Public Accountants, Member
- Georgia Society of Certified Public Accountants, Member
- Pension Education Council of Atlanta, Board of Directors
- Kate's Club, Inc., Board of Directors
- Georgia Center for Nonprofits, Member
- Atlanta Chapter of Women in Pensions Network, Former Advisory Committee Member
- National Women in Pensions, Inc., Former Board Member

**CPA, CNAP**

**Principal, Assurance  
Employee Benefits Plan  
Leader**

**Principal,  
Not-for-Profit Assurance  
Leader**

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## EDUCATION

**Kennesaw State University,**  
Master of Accountancy

**Auburn University,**  
Bachelor of Science in Accounting

## CERTIFICATIONS

Certified Public Accountant, GA  
CNAP-Certified



## PUBLICATIONS & THOUGHT LEADERSHIP

- How to Make Your 401K Audit a Painless Process
- DOL Releases Final ESG Rule for Retirement Plan Fiduciaries
- Setting Expectations for Your First Benefit Plan Audit
- The Cost of an Employee Benefit Plan Audit
- Choosing an Auditor for a First-Time Benefit Plan Audit
- Planning for a First-Time Benefit Plan Audit
- Changes on the Horizon for Plan Sponsors and Auditors of Employee Benefit Plans
- Be Prepared: Choosing your Employee Benefit Plan Auditor
- Documentation: A Critical Tool for Employee Benefit Plan Audits
- Cybersecurity for Employee Benefit Plans
- Importance of Employee Benefit Plan Governance

## PRESENTATIONS

- Common Investments in Employee Benefit Plan Plans, AICPA & CIMA Employee Benefit Plans Conference 2022
- Financial Reporting and Wrap-Up, AICPA & CIMA Employee Benefit Plans Conference 2022