



ANNE MORRIS



EXPERIENCE

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

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.

She currently serves on the Leadership Council of the Georgia Society of Certified Public Accountants and has previously served as the chairperson of its Employee Benefit Plan Conference. Anne is also 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.

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 & 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