



ROB GUTMANN, CPA

Managing Consultant, Defined Contribution

Areas of Expertise

ESOP

Defined Contribution

Recordkeeping

Plan Administration

Plan Design

Plan Compliance

Retirement Consulting

Rob specializes in the design and administration of Employee Stock Ownership Plans as well as other employer-sponsored defined contribution plans. Rob has 40 years of experience in public accounting and industry. He is a Certified Public Accountant licensed in the state of Kentucky.

Education

Bellarmine University, Louisville, KY — B.A., Accounting

Publications and Presentations

- *Things You Need to Know about Administering Your ESOP (But are Afraid to Ask)*, Speaker - Tri-State ESOP Conference, 2015
- *Introduction to ESOPs*, Speaker - American Council of Engineering Companies meeting (Baltimore chapter), 2014
- *Before the ESOP Audit: Prevention and Preparation*, Speaker - NCEO Conference, 2014
- *Taming the Audit Monster - How to Survive a DOL or IRS Audit*, Speaker - Tri-State ESOP Conference, 2013

Professional and Community Involvement

- American Society of Certified Public Accountants
- Kentucky Society of Certified Public Accountants
- ESOP Association (Past Vice President)
- Louisville Employee Benefits Council (Past President)

Contact Me

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