

# Gwen Mazzola, CPA

## Partner

### Fayetteville

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Gwen Mazzola joined HoganTaylor in 2008 and currently serves as the Firm's Lead Employee Benefit Plan Partner. She has more than 25 years of experience providing audit and accounting services to clients and devotes 100% of her professional efforts in the employee benefit plan industry.

Gwen was recently been appointed to the Department of Labor's Advisory Council and will be serving a three-year-term. Gwen is also currently serving as the co-chair of the American Institute of Certified Public Accountants (AICPA) Employee Benefit Plans National Conference planning committee and as a member of the AICPA EBP Audit and Accounting Guide task force. Gwen previously served as a member of the AICPA's Employee Benefit Plan Audit Quality Center's Executive Committee. Gwen is a presenter at various conferences nationwide, including the AICPA Employee Benefit Plan National Conference.

Gwen is a member of the AICPA, the Arkansas Society of Certified Public Accountants, the Oklahoma Society of Certified Accountants, and the Texas Society of Certified Public Accountants.

Gwen is a Summa Cum Laude graduate from the University of Arkansas with a Bachelor of Science in Business Administration in Accounting.

## Certifications & Honors

- Certified Public Accountant (CPA)

## Professional & Civic Affiliations

- American Institute of Certified Public Accountants (AICPA), member
- AICPA Employee Benefits Plan National Conference, planning committee member 2013 - current
- Southwest Benefits Association, Former Board member
- Employee Benefits Institute, Board Member and Regional Ambassador
- Arkansas Society of Certified Public Accountants (ASCPA), member
- Oklahoma Society of Certified Public Accountants (OSCPA), member
- Texas Society of Certified Public Accountants (TXCPA), member
- BDO Employee Benefit Plan Alliance Community, Steering Committee former member
- Tulsa Employee Benefits Group, member
- Northwest Arkansas Human Resources Association, member
- Leadership Benton County, Steering Committee member, 2009 to 2017
- Leadership Benton County, Graduate, 2008

## Education

- B.S.B.A. in Accounting, The University of Arkansas, Summa Cum Laude

## Speaking Engagements & Published Articles

- Arkansas Fiduciary Summit, “Common Operational Errors and the Impact on Financial Statements and Communications”, August 2022
- AICPA EBP Audit Quality Center webcast, “Common Operational Errors “, June 2022
- Massachusetts Society of CPAs, “Best Practices in Project Management”, May 2022
- Florida Institute of CPAs MEGA Conference, “Risk Assessment and Planning for Employee Benefit Plans”, “A&A Update – Employee Benefits Focused”, and Panel Discussion: Ask the EBP Experts”, June 2022
- The Plan Sponsor University, Panelist of Industry Experts, Louisville, KY, January 2022; Houston, TX, February 2022; Charlotte, NC, March 2022; Indianapolis, IN, April 2022; Oklahoma City, OK, May 2022; St. Louis, MO, June 2022; Houston, TX, July 2022; Charlotte, NC, Aug 2022
- Missouri Society of CPAs, “Risk Assessment and Planning for Employee Benefit Plans”, May 2022
- AICPA National Conference on Employee Benefit Plans, “Understanding Plan Documents”, May 2022
- AICPA National Conference on Employee Benefit Plans, “Operational Errors: Corrections and Impact to Reporting and Communications”, May 2022
- AICPA National Conference on Employee Benefit Plans, “Best Practices in Project Management”, May 2022
- Arkansas Society of CPAs, “Planning and Risk Assessment for Employee Benefit Plans” and “The Impact of SAS 136 and Other Considerations”, April 2022
- AICPA EBP Audit Quality Center webcast, “401(k) Basics, Part 1”, April 2022
- The Plan Sponsor University, Panelist of Industry Experts, June 2021, July 2021, October 2021
- HT ERISA Summit, “Changes are Coming to Your Employee Benefit Plan Audit”, August 2021
- Florida Institute of CPAs MEGA Conference, “SAS 136: Forming an Opinion and Reporting on EBP Financial Statements”, June 2021
- Massachusetts Society of CPAs, “CARES and SECURE Acts: The Impact on EBP Audits”, May 2021
- AICPA National Conference on Employee Benefit Plans, “Audit Completion and Wrap Up” and “Hit the Jackpot: Improve Audit Efficiency with Effective Project Management”, May 2021
- AICPA Employee Benefit Plan Audit Quality Center webinar, “2020 EBPAQC Managers and Supervisors Audit Planning/Accounting and Auditing Update: Accounting, Auditing & SECURE Act Update”, April 2021
- The Plan Sponsor University, Panelist of Industry Experts, April 2021
- AICPA National Conference on Employee Benefit Plans, “The Aftermath of CARES Act and Continuing the COVID 19 Chronicles”, November 2020

- The Plan Sponsor University, Panelist of Industry Experts, September 2020
- Texas Society of CPAs, “EBP Audit Best Practices in Project Management” and “Financial Statements – Avoiding Common Mistakes”, May 2020
- AICPA Employee Benefit Plan Audit Quality Center webinar, “401(k) Basics, Part 4”, May 2020
- AICPA National Conference on Employee Benefit Plans, “Round Table on SECURE Act”, May 2020
- AICPA Employee Benefit Plan Audit Quality Center webinar, “2020 EBPAQC Managers and Supervisors Audit Planning/Accounting and Auditing Update/Accounting, Auditing & SECURE Act Update”, April 2020
- AICPA Employee Benefit Plan Audit Quality Center webinar, “401(k) Basics, Part 2”, April 2020
- Tulsa Employee Benefits Group, “Audit Readiness – from an Auditor’s Perspective”, January 2020
- HoganTaylor Employee Benefit Plan Summit, “Fraud in Retirement Plans – Keeping Hands Out of the Cookie Jar!” August 2019
- Florida Institute of CPAs MEGA Conference, “Peer Review of EBP and the Effect of “the Bolded” and “Ask the Experts”, June 2019
- AICPA Employee Benefit Plan Audit Quality Center webinar, “401(k) Basics – Participant Data, Allocations, Payroll and Contributions Testing”, May 2019
- AICPA National Conference on Employee Benefit Plans, “Contributions, Eligibility, and Participant Data” and “Financial Reporting and Audit Wrap-Up”, May 2019
- Texas Society of CPAs, “How did Fraud Happen Under Everyone’s Nose” and “Ask the Experts”, May 2019
- AICPA Employee Benefit Plan Audit Quality Center webinar, “401(k) Basics”, May 2019
- Tennessee Society of CPAs, “Investments Common in Employee Benefit Plans”, April 2019
- The Plan Sponsor University, Panelist of Industry Experts and “What’s Working and What is Not Working in EBP Plans”, March 2019
- Florida Institute of CPAs MEGA Conference, “Ask the Experts” and “Auditing in a Paperless Environment and the Appropriate Use of SOC Reports”, June 2018
- AICPA National Conference on Employee Benefit Plans, “Contributions and Participant Data” and “Asking for a Friend”, May 2018
- McAfee & Taft, EmployerLinc18 “Preparing for 401(k) Audit Season”, March 2018
- SouthWest Benefits Association, “CyberSecurity for Benefits”, co-presenter, November 2017
- HoganTaylor’s ERISA Seminar, “CyberSecurity”, co-presenter, August 2017
- Florida Institute of CPAs MEGA Conference, “Ask the Experts”, June 2017
- Florida Institute of CPAs MEGA Conference, “Show Me the Workpapers”, June 2017
- AICPA National Conference on Employee Benefit Plans, “Fundamental Track – Internal Controls and SOC 1 Reports”, May 2017
- AICPA National Conference on Employee Benefit Plans, “Fundamental Track – Auditing Contributions”, May 2017
- SouthWest Benefits Association, “Change is in the Air: Form 5500 – It’s Not Just a “Signature Page”, March 3, 2017 (Dallas, Tx); April 7, 2017 (Oklahoma City, OK)

- Ultimate Software Lunch and Learn, “Definition of Compensation – A Very Common and Often Expensive Error”, February 8, 2017, Little Rock, AR
- SouthWest Benefits Association, “Overview of New Accounting Standards for Benefits and Revisions to Form 5500”, November 2016
- Florida Institute of CPAs MEGA Conference, “Accounting and Auditing Update”, June 2016
- Florida Institute of CPAs MEGA Conference, “ Audit Project Management “, June 2016
- AICPA National Conference on Employee Benefit Plans, “Ask the Experts”, May 2016
- AICPA National Conference on Employee Benefit Plans, “Developing a Training Program”, May 2016
- AICPA National Conference on Employee Benefit Plans, “Initial Audit Considerations”, May 2016
- SouthWest Benefits Association, “Current Issues in Nonprofit, Higher Education and Governmental Retirement Plans”, November 2015
- AICPA National Conference on Employee Benefit Plans, “Audit Project Management”, “Definition of Compensation” and “Ask the Experts”, May 2015
- McAfee & Taft webinar, “DOL Audit Quality Study”, April 2015
- Employee Benefit Plan Compliance Update, 2014, “Definition of Compensation”, Northwest Arkansas Human Resources Association and Tulsa Employee Benefit Group, presenter
- AICPA National Conference on Employee Benefit Plans, “Audit Project Management”, “Definition of Compensation” and “Ask the Experts”, May 2014
- Oklahoma Society of Human Resource Management’s State Conference, “Common Errors and How to Avoid Them: Your Fiduciary Duties in Relation to Employee Benefit Plans”, May 2014
- Southwest Benefits Association, “Preparing for a DOL Audit: What Plan Administrators Need to Know”, Oklahoma City, March 2014,
- Employee Benefit Plan Compliance Update, 2013, “Fiduciary Responsibilities” Northwest Arkansas Human Resources Association and Tulsa Employee Benefit Group, presenter
- Employee Benefit Plan Compliance Update, 2012, Northwest Arkansas Human Resources Association and Tulsa Employee Benefit Group, presenter
- Presenter of “Fiduciary Responsibilities,” Arkansas State Human Resources Management Conference, 2011
- Employee Benefit Plan Compliance Seminar, 2010 and 2011, Oklahoma State Council for Human Resource Management, Q&A Expert Panel
- Employee Benefit Plan Compliance Seminar, 2011, Northwest Arkansas Human Resources Association, Q&A Expert Panel