

Patrick Hoffert, CPA

Partner



Patrick Hoffert
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Patrick started his career with Reilly, Penner & Benton LLP (RPB) in 1998. Prior to becoming a partner in 2009, he gained significant experience in a broad array of financial services by splitting his time between assurance and tax work during his first 10 years at RPB. He credits his diverse background for his current ability to help a variety of clients strengthen internal controls, improve accounting procedures, and understand their financial needs.

Today, Patrick heads the firm's ERISA audit practice and oversees audits of employee benefit plans for privately-held, publically-traded, and not-for-profit organizations. Patrick works with many types of plans including 401(k) plans, profit sharing plans, 403(b) plans, defined benefit plans, health and welfare plans, and ESOP's.

Patrick's experience also allows him to practice in several other areas for RPB. He oversees assurance and tax engagements for closely-held businesses and not-for-profit organizations. Patrick is a registered Peer Reviewer with the AICPA. This designation allows him to provide peer review services to other CPA firms, helping these firms to evaluate their quality control systems to provide firms with reasonable assurance of performing and reporting in conformity with applicable professional standards. He provides value-added services to these firms by providing them with information on new developments within the CPA industry.

Areas of specialization

- Employee Benefit Plans
- Nonprofit Organizations
- Manufacturing
- Service-based Businesses
- Commercial Real Estate
- CPA Firms
- SEC Companies (Employee Benefit Plan audits only)

Education

- BBA, UW-Whitewater

Professional Organizations and Activities

- AICPA
- AICPA Employee Benefit Plan Audit Quality Center
- WICPA
- WICPA Peer Review Committee
- International Foundation of Employee Benefit Plans
- Advisory Board - Children's Service Society of Wisconsin
- Premier Advisor - Sage Accountants Network for Peachtree Accounting Software



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