

Plans in Wisconsin expected to need their first audit for plan year 2026

Built from U.S. Department of Labor Form 5500 public data (EFAST2, data as of 30 Sep 2026). A plan that filed Form 5500-SF for 2025 and reported **121 or more participants with account balances** at year-end generally loses the small-plan audit waiver for the next plan year (29 CFR 2520.103-1, 80-120 participant rule).

27
plans in Wisconsin on the 2026 forecast list

132
plans in Wisconsin on the 100-120 watch list

81%
of comparable 2023 forecasts filed an audited return the next year

Sample: 5 of 27 plans

Plan sponsor	City	Industry	Type	With balance BOY 2025	With balance EOY 2025	Net assets	Audited 5500 due
GNK ENTERPRISES LLC GNK ENTERPRISES LLC 401(K) PROFIT SHARING PLAN & TRUST	Milwaukee	Retail	401(k)	105	121	\$94,693	2027-07-31 ext. 2027-10-15
KRIER & BLAIN, INC. KRIER & BLAIN, INC. 401(K) PROFIT SHARING PLAN	Little Chute	Other Services	401(k)	111	125	\$8,396,952	2027-07-31 ext. 2027-10-15
APPLETON LUMBER COMPANY, INC. DBA KONZ WOOD PRODUCTS APPLETON LUMBER COMPANY SAVINGS AND RETIREMENT PLAN	Appleton	Manufacturing	401(k)	110	130	\$9,307,530	2027-07-31 ext. 2027-10-15
DON JOHNSON MOTORS, INC. DON JOHNSON MOTORS, INC. 401(K) PROFIT SHARING PLAN	Rice Lake	Retail	401(k)	115	136	\$10,227,709	2027-07-31 ext. 2027-10-15
BEECHWOOD HOTEL GROUP LLC BEECHWOOD HOTEL GROUP LLC 401(K) PLAN	Green Bay	Accommodation & Food	401(k)	65	297	\$711,821	2027-07-31 ext. 2027-10-15

Deadlines are for the first audited plan year (2026, calendar-year plans): last day of the 7th month after plan year end; 15th day of the 10th month with Form 5558.

Who audits plans in Wisconsin today

Audit firm	Plan audits (PY2024)	Share in state
Cliftonlarsonallen LLP	363	18.4%

Audit firm	Plan audits (PY2024)	Share in state
Wipfli LLP	317	16.1%
Baker Tilly US, LLP	229	11.6%
Vrakas S.c.	136	6.9%
Sikich CPA LLC	97	4.9%
Hawkins Ash CPAS, LLP	90	4.6%
Reilly, Penner & Benton LLP	57	2.9%
Grant Thornton LLP	54	2.7%

Forecast list by industry

Industry	Plans
Manufacturing	7
Professional Services	4
Real Estate	3
Retail	3
Transportation	2

The full Wisconsin list includes every forecast plan with sponsor, EIN, plan number, city, industry (NAICS), participant trend, net assets and deadlines, plus the watch list and monthly updates through the 2026 filing season. Founding price: \$290 per year for Wisconsin, \$990 nationwide. Reply to the email to reserve.

Source: U.S. Department of Labor, EBSA Form 5500 datasets (public data). Company-level information only; no personal data. Forecasts are estimates based on filed data and are not legal or audit advice. First Audit Radar · firstauditradar.com