

Plans in Texas 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).

165

plans in Texas on the 2026 forecast list

358

plans in Texas on the 100-120 watch list

81%

of comparable 2023 forecasts filed an audited return the next year

Sample: 5 of 165 plans

Plan sponsor	City	Industry	Type	With balance BOY 2025	With balance EOY 2025	Net assets	Audited 5500 due
MACLEAN ENGINEERING & APPLIED TECHNOLOGIES, MACLEAN ENGINEERING & APPLIED TECH 401(K) P/S	Houston	Professional Services	401(k)	102	121	\$15,386,625	2027-07-31 ext. 2027- 10-15
CLAREMONT PROPERTY CO. CLAREMONT PROPERTY CO. 401(K) PLAN	Bellaire	Construction	401(k)	99	126	\$914,612	2027-07-31 ext. 2027- 10-15
LAWNSTARTER LAWNSTARTER, INC. 401(K) PLAN	Austin	Information	401(k)	104	132	\$2,352,793	2027-07-31 ext. 2027- 10-15
DAVCOR AVIATION SERVICES INC. DAVCOR AVIATION SERVICES 401(K) PLAN	San Antonio	Transportation	401(k)	106	149	\$891,612	2027-07-31 ext. 2027- 10-15
FUNCTION HEALTH, INC. FUNCTION HEALTH 401(K) PLAN	Austin	Information	401(k)	72	333	\$7,055,220	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 Texas today

Audit firm	Plan audits (PY2024)	Share in state
Baker Tilly US, LLP	311	6.4%
Weaver and Tidwell, LLP	275	5.6%
Forvis Mazars, LLP	222	4.5%
Whitley Penn LLP	198	4.0%

Audit firm	Plan audits (PY2024)	Share in state
Crowe LLP	148	3.0%
Pricekubecka, PLLC	118	2.4%
Melton & Melton, LLP	117	2.4%
BDO USA, P.C.	107	2.2%

Forecast list by industry

Industry	Plans
Professional Services	39
Health Care	18
Manufacturing	14
Other Services	13
Transportation	10

The full Texas 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 Texas, \$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