

# ESOP Services

## AN EMPLOYEE STOCK OWNERSHIP PLAN CAN BECOME A VITAL COMPONENT OF YOUR SUCCESSION PLAN. LET APRIO HELP YOU MAXIMIZE ITS VALUE.

An Employee Stock Ownership Plan (ESOP) is a defined contribution plan that is operated through a plan trust and governed by the Employee Retirement Income Security Act (ERISA).

ESOPs offer business owners a tax advantaged succession planning vehicle, that provides flexible options for selling a portion or all of a business while preserving the legacy of the company, its employees and exiting owners. Founders and main shareholders can sell back all of their shares at once, or percentages of their shares over time to the ESOP. This facilitates more control over exit payouts and the transition of leadership consistent with the owner's wishes.

### ESOPs are most commonly implemented to:

- Provide attractive after-tax cash flow for departing owners of closely-held companies
- Create substantial long-term incentives and rewards for management and employees
- Give owners the flexibility to gradually transition ownership over a period of time and thus remain actively involved in the business

### To learn more about Aprio's ESOP Services, contact:



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### COMPREHENSIVE SERVICES FOR ALL ESOP PARTICIPANTS



The ESOP



The Company



Individuals

Aprio offers comprehensive transaction advisory services for businesses that maintain existing ESOP plans or for those considering this model. Depending on our role we provide the following ESOP services:

- Financial & tax due diligence
- Income tax & accounting
- Assurance services
- Valuation services
- Wealth Management - Private Client Services

### About Aprio

Since 1952, clients throughout the U.S. and across more than 50 countries have trusted Aprio for guidance on how to achieve what's next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

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