

Employee Stock Ownership Plan

Removing the Pressure of Managing Your ESOP

Employee stock ownership plans (ESOPs) offer distinct opportunities, but they also encompass a particular set of rules relating to both financial presentation and tax navigation. Managing an ESOP requires in-depth knowledge of the financial components and extensive experience in establishing an overall plan. That's where we come in.

Trust WNDE for Your Accounting and Advisory Needs

With more than 90 years of experience providing high-quality audit, tax, and management advisory services, White Nelson Diehl Evans is eager to help you reach your full potential. Our mission is to deliver quality, integrity, and balance in all aspects of client service. We achieve this mission by seeking to gain a complete understanding of your goals and aspirations, then we work tirelessly to help you achieve them. It's as simple as this—at WNDE, your success is our success.

Experience Matters

The ESOP team at White Nelson Diehl Evans LLP has vast experience in providing tax, accounting and advisory service to employee-owned companies. We have worked with a variety of clients from the feasibility phase all the way through to the closing transaction. We know how to look for possible alternatives and will guide you through the tax implications of an ESOP.

We would love to talk with you about your ESOP needs.

Contact us today to set up a consultation.

WHAT CAN YOU EXPECT?

When you partner with WNDE, you will receive customized services to fit your individual needs. We offer a full range of services tailored to ESOPs, including:

- Audit, review, and compilation of financial statements
- Consultation in applying ESOP accounting
- Employee communications
- Entity and transaction structuring
- ESOP feasibility studies
- ESOP plan audits
- Mergers and acquisition due diligence
- Succession planning and executive compensation studies
- Tax structuring and planning/preparation
- Termination guidance

We work with your team of advisors, including:

- Legal representation
- Lenders
- Owners/sellers
- ESOP plan administrators
- Trustees