

Unlock the Power of ESOPs for Succession Planning

Employee Stock Ownership Plans (ESOPs) are a valuable succession planning option offering a range of financial and operational advantages.

ESOPs can be advantageous in succession planning for several key reasons:

Tax Savings

Companies that are 100% ESOP-owned and structured as S-Corporations, federal income taxes are effectively eliminated.

Employee Motivation and Retention

Employees who see the direct benefits of their hard work in the form of company shares are more likely to stay with the company long-term, reducing recruitment and training costs.

Legacy Preservation

For business owners who are deeply invested in the legacy of their company, an ESOP can be an excellent succession planning tool.

Improved Cash Flow

With reduced tax liabilities, companies have more available capital to reinvest in their operations.

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“An ESOP was a great choice for me because I knew I wanted to see my employees succeed well into the future. I knew with an ESOP, I was leaving the company in good hands.”

BUSINESS OWNER

Advantages of Working with an ESOP Holding Company

Working with an ESOP holding company offers a streamlined, efficient method to transition into an ESOP structure, minimizing the learning curve and maximizing benefits.

If you hope to preserve your legacy through an ESOP, working with an established and successful ESOP holding company can turn your dream into a reality.

Other important advantages:

- Established infrastructure for ESOP management
- Reduced compliance costs
- Expertise in ESOP valuations and transactions
- Long-term support and stability
- Employee retention and reward

OwnersEdge is a mid-market 100% employee-owned ESOP holding company. We are structured to acquire new operating companies and invest in the growth of our existing businesses. Everything we do is intended to deliver value to our collective employee owners so they have a pathway to their American Dream.

Contact us to learn how we can support you in exploring the benefits of ESOPs. Our team is ready to assist you in every step of the process.

OwnersEdge.com

