

ARTICLES

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Service

Employee Stock
Ownership Plans

Professional

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Are ESOPs "It" For The Privately Held?

For business owners considering succession, an ESOP provides an alternative to selling the business to a third party or management. An ESOP is a qualified retirement plan that operates under many of the same rules that apply to a 401(k), except that employees don't contribute their own money and the plan invests in employer stock rather than mutual funds. The ESOP typically acquires stock by buying it from the company or the company owner(s).

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