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Creating An ESOP In The Time Of A Pandemic

DATE

October 29, 2020

Noon-1 p.m. (Eastern)

SPEAKERS



**Michael G.
Paton**
Of Counsel
(Retired)



**Andrew
Manchir**
Director
Katz, Sapper &
Miller's Valuation
and ESOP
Services Group

Employee stock ownership plans (ESOPs) have long been a compelling succession planning technique. In light of the current pandemic, fewer ESOP transactions have closed this year due largely to uncertainty involving business valuations. Nonetheless, as markets rebound and stabilize and businesses regain their footing, ESOPs are becoming more and more viable. Using a case study from a recent ESOP transaction, speakers from Barnes & Thornburg and Katz, Sapper & Miller will cover:

- What is an ESOP?
- Why and when an ESOP makes sense
- Benefits of an ESOP over other exit and succession planning options
- How to create, fund, and operate an ESOP

- The mechanics of an ESOP transaction
- The tax benefits of an ESOP

This program is offered compliments of Barnes & Thornburg and Katz, Sapper & Miller

Questions? [Email Lindsay Hulliberger](#) or call 312-214-5661.