

ESOP PARTNERS: MORE THAN A TPA

INVESTED IN YOUR ESOP EVERY STEP OF THE WAY

ESOP Partners, founded in 2006 by Aaron Juckett. Our business model is simple and effective: integrate proactive consulting with ESOP administration, using our expertise in both to reduce the risk of errors and missed opportunities.

ESOP Partners' services include:

- Third Party Administration
- Second Stage Transaction Planning, Structuring and Management
- Re-Leveraging Consulting
- Repurchase Liability Studies
- Ownership Culture and Communications
- Distribution Policies
- Audit Assistance
- Corporate Governance
- Total Compensation Statements

ESOP Partners is not only the Third Party Administrator and record keeper for ESOPs throughout the United States, we also help business owners that are considering an ESOP fully vet the many structures available to them.

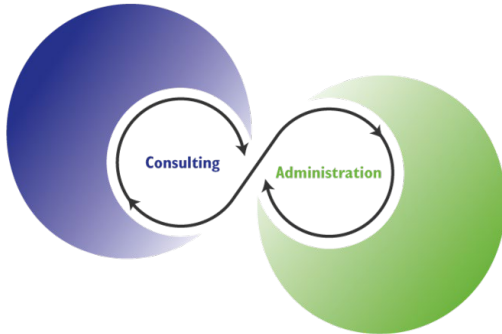
Our Succession Advantage™ Ownership Transition Process leverages our expertise in ESOP Administration to insure your ESOP is set up for long term success. Our 4 step process is simple and effective.

1. No-Cost Feasibility Analysis
2. Comprehensive Feasibility Modeling
3. Plan Design and Establishment
4. Transaction Design and Implementation

Since ESOP Partners not only administers existing ESOP plans, but also helps companies model out and implement ESOPs, you get 360° of care. Our business model provides a solution that maximizes the potential of your ESOP, optimizes the performance and includes ESOP administration and consulting. We are there throughout the lifecycle of your ESOP, making sure the plan is monitored, managed and maximized.

ESOP PARTNERS CORE SERVICES

Since ESOP Partners not only administers existing ESOPs, but also helps companies model out and implement ESOPs, you get 360° of care. Our business model includes ESOP administration and consulting which means we are uniquely able to provide a solution that maximizes the potential and optimizes performance of your plan. We're there throughout the lifecycle of your ESOP, making sure the plan is monitored, managed and maximized.



Services for Companies Considering an ESOP

- ESOP Partners' Succession Advantage™ Ownership Transition Process
 - Feasibility Modeling
 - Transaction Modeling
 - Consulting

Services for Existing ESOP Companies

- Third Party Administration Services
- ESOP Partners' Succession Advantage™ Ownership Transition Process
 - Re-Leveraging
 - Second-stage Transaction Planning, Structuring and Management to increase the ESOP's ownership percentage (i.e. sell more shares to the ESOP)
- Consulting
 - ESOP PROS™ (Proactive Repurchase Obligation Strategy)
 - Ownership Culture and Communications
 - Distribution Policies
 - Audit Assistance
 - Corporate Governance and Fiduciary Consulting Services
 - Total Compensation Statements
 - Termination of ESOP

Contact Information



PRESIDENT & FOUNDER

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Aaron is a member of The ESOP Association (TEA) and the National Center for Employee Ownership (NCEO) and is a frequent speaker on a variety of ESOP topics. His involvement in the ESOP Association includes serving as a Chapter Officer for the Wisconsin Chapter and membership in the Ownership Culture Committee.