



Benefit plan services

Your trusted ESOP services provider

As one of the largest public accounting, consulting, and technology firms in the United States, Crowe combines deep industry expertise with more than 30 years of ESOP services experience to provide consulting and support for companies like yours. Whether yours already is an ESOP company or you are thinking about an ESOP, you can trust our extensive knowledge and experience to help you navigate the associated transactional and administrative challenges.

crowe.com/esop

ESOP services overview

Crowe provides a full complement of ESOP consulting and administrative services, including:

- Feasibility studies
- Annual recordkeeping
- Compliance testing
- Form 5500 preparation
- Repurchase liability analyses
- Assistance for S and C corporations
- KSOP and other qualified plan consulting

For more information on Crowe ESOP services, visit crowe.com/esop.

The Crowe advantage

Crowe has earned its reputation as one of the leading national ESOP services providers by providing knowledgeable, timely, and accurate support to meet

diverse ESOP needs. Our dedicated team provides services to more than 500 ESOP clients, ranging in size from six to more than 16,000 ESOP participants.

Your company benefits from our ESOP proficiency, as well as the accessibility of a professional and knowledgeable account liaison who understands the ins and outs of your ESOP. We thoroughly review each step of the work performed and identify efficiencies to make the most of your company's plan.

Crowe professionals also add value to your ESOP through specialized training and experience. Our CPAs, certified pension consultants, attorneys, certified employee benefit specialists, defined contribution plan administrators, and qualified pension administrators are equipped to help you achieve your unique objectives.



Learn more

Whatever your ESOP questions, we take pride in delivering answers. For more information on Crowe ESOP services or to request a proposal, please contact:

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