

Benefit Plan Services

crowe.com

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.

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 www.CroweESOPAdvantage.com.

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.



Connect With Us

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

Lori Stuart
+1 614 280 5229
lori.stuart@crowe.com

About Crowe

“Crowe” is the brand name under which the member firms of Crowe Global operate and provide professional services, and those firms together form the Crowe Global network of independent audit, tax, and consulting firms. Crowe may be used to refer to individual firms, to several such firms, or to all firms within the Crowe Global network. The Crowe Horwath Global Risk Consulting entities, Crowe Healthcare Risk Consulting LLC, and our affiliate in Grand Cayman are subsidiaries of Crowe LLP. Crowe LLP is an Indiana limited liability partnership and the U.S member firm of Crowe Global. Services to clients are provided by the individual member firms of Crowe Global, but Crowe Global itself is a Swiss entity that does not provide services to clients. Each member firm is a separate legal entity responsible only for its own acts and omissions and not those of any other Crowe Global network firm or other party. Visit www.crowe.com/disclosure for more information about Crowe LLP, its subsidiaries, and Crowe Global.