

valuation & ESOP services

Katz, Sapper & Miller has been in business for more than 75 years and has earned a reputation as a leader in the areas of accounting, audit, tax, and consulting services. Our thousands of clients include some of the country's leading companies, and our partners and employees are respected throughout the region for their expertise and for their roles in the community.

ESOP ADVANTAGE

Business owners can use Employee Stock Ownership Plans (ESOPs) as part of their succession planning strategy. Structured properly, an ESOP allows an owner to begin diversification of their equity while maintaining control. As a tax-advantaged alternative to third-party sales, a sale to an ESOP should be considered by a business owner assessing their succession planning options.

ESOPs are an opportunity for employees to acquire shares of company stock leading to greater motivation, productivity, and sense of ownership. As both a corporate finance tool and an appealing employee benefit, ESOPs are becoming more popular in both closely held and large corporations.

KSM knows the value of an ESOP firsthand. Since implementing our own ESOP in 2001, in addition to the numerous tax advantages, we have benefited from those same values that are important to you. Therefore, KSM can help you institute an ESOP for your company, and you will receive the best professional advice available.

ESOP EXPERIENCE

The professionals of KSM combine the depth of ESOP financial advisory experience with the breadth that comes from the firm's position as a leader in the areas of accounting, audit, and consulting services.

Dan Rosio and Andy Manchir have earned the Accredited Senior Appraiser (ASA) designation. The ASA designation reflects the combination of education, experience, and adherence to standards that are the hallmark of high-quality business valuation services. In addition, Andy Manchir is an active member of The ESOP Association and has served as president of the Indiana Chapter. He has also been named to The ESOP Association's Valuation Advisory Committee, a panel of noted ESOP professionals across the country that advise the Association on topical issues related to valuation.