

EMPLOYEE STOCK OWNERSHIP PLANS

WATKINS ROSS ADVANTAGE

Founded in 1948, Watkins Ross is a unique firm. We are a 100% ESOP-owned company, so the employees of Watkins Ross live and breathe ESOP every day. Consequently, we bring a uniquely qualified perspective to the issues ESOP participants and decision makers face on a daily basis.

We understand that the level of TPA service required by an ESOP company is as unique as the company itself.

FEE STRUCTURE

Our services and fees are clearly defined and address those services that are unique to an ESOP.

VALUE IS A FUNCTION OF BOTH COST AND BENEFIT.

CONTACT US

Watkins Ross can help you determine the best plan design to achieve your corporate goals and better prepare your employees for retirement.

EXPERTISE

Watkins Ross understands that comprehensive administration of an ESOP is required if a company intends to take full advantage of the various financial opportunities that sponsoring an ESOP can offer.

SERVICES

Consult & Collaborate

Our team collaborates with a company's other ESOP service providers (attorney, lender, valuation specialist, financial advisor) to review & monitor a company's options to design and maintain a plan that best meets the company's needs.

Maintain Records

Watkins Ross maintains accurate and complete records including diversification and distribution histories, separate account data on each stock transaction for 1042, cost basis and more.

IRS/DOL Regulations

Our team monitors IRS & DOL regulations to determine the effect on existing and newly created ESOP plans and companies.

VALUE

Employee Perspective

Proper administration of an ESOP is critical to ensuring that the plan participants perceive the ESOP as a valuable employee benefit.

WATKINS ROSS IS A MEMBER OF THE ESOP
ASSOCIATION AND THE NATIONAL CENTER FOR
EMPLOYEE OWNERSHIP (NCEO).