



Employee Stock Ownership Plans (ESOP)

OUR FIRM

Founded in 1948, Watkins Ross has been designing and administering cash balance plans to provide strategically targeted benefits and increased tax deferred savings since 1999.

We allocate resources specifically to cash balance administration and make it a primary focus of our business including personnel.

WR ADVANTAGES

We are 100% ESOP-owned so the employees of Watkins Ross live and breathe ESOP every day. Consequently, we bring a unique qualified perspective to the issue's ESOP participants and decision makers' face on a daily basis.

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

FEE STRUCTURE

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

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.

VALUE

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



VALUE IS A FUNCTION OF BOTH BENEFIT AND COST.



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.

CONTACT US

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