## CENTRAL INDIANA CHAPTER OF RMA PRESENTS:
# EMPLOYEE STOCK OWNERSHIP PLANS – WHAT YOU NEED TO KNOW

**When: Wednesday June 17, 11:00am – 12:30 PM (EDT)**
**Where: Virtual Presentation via Zoom – Register at**
https://blueandco.zoom.us/webinar/register/WN_jvd-nNstSLOgFdo-iiLjuQ (**There is no fee required for this event)**

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**Program Overview: The following topics and others will be discussed. (*Certified for 1.5 Hours RMA CRC Continuing Education Credit – Pending approval)***

- What is an employee stock ownership plan? (ESOP)
- Why an employee stock ownership plan? (ESOP)
- How does an ESOP work?
- Client considerations related to an ESOP
- What should banks be thinking about as it relates to their ESOP clients?
- ESOP trust considerations
- ESOP valuation considerations
- ESOP legal considerations

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**Presenters include:**

**Steve Goodman, Shareholder/Partner, Lynch, Cox, Gilman & Goodman, PSC. –** Mr. Goodman's practice concentrates in the areas of transactional matters, tax, corporate & security law, business succession planning, employee benefits (specialization in ESOPs) and estate planning. Prior to joining Lynch, Cox, Gilman & Goodman, P.S.C., Mr. Goodman was a Shareholder/Partner with the Louisville, Kentucky firm of Goldberg-Simpson, P.S.C.

Mr. Goodman represents banks, trust companies, insurance companies and other financial institutions. He also represents taxpayers before the Internal Revenue Service as well as state and local governmental agencies in tax disputes.

**Michael Miller, Owner, Apex Pension Strategies, Inc. –** Mr. Miller has been in the retirement planning industry since 1989. He has worked with companies both large and small, assisting them with plan design, consulting, and administration. Michael's experience spans defined benefit, defined contribution, and nonqualified retirement plans.

**Brad Minor, Director, Blue and Co., LLC** – Mr. Minor oversees the firm's Valuation and Financial Forensics Group since 1999. He performs business valuations, assists with real estate and machinery & equipment appraisals, and he has supported attorneys and clients in various areas of litigation. Brad also consults regularly with closely-held businesses in all areas of their operations and is responsible for tax consulting and planning for several corporate and individual tax clients.

Please email any questions to Tyler Tedford @ ttedford@blueandco.com