

Successfully Established a new Employee Stock Ownership Plan (ESOP) for a Community Bank

SmithAmundsen successfully established a new Employee Stock Ownership Plan (ESOP) for a community bank. The project included drafting the plan document, declaration of trust, summary plan description and all plan administrative forms, as well as preparing and filing a Request for Letter of Determination with the IRS.

PROFESSIONALS

Kelly Haab-Tallitsch
Partner

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