



## ESOP Candidate Questions

- Would you like to sell your company, pay no tax on the gain and at the same time significantly reduce your estate tax?
- Did you know that your company can purchase your stock and fully deduct the entire purchase price?
- Are you interested in getting liquidity out of your company on a tax-favored basis so that you can diversify your wealth while still retaining control of your company?
- Did you know that as a 100% ESOP owned S-corporation you can achieve a significant competitive advantage by eliminating all income taxes on company earnings?
- Did you know that you can help creditor proof yourself by selling all or a portion of your company to an ESOP?
- Did you know that employees do not own the stock in their ESOP accounts and almost never get to vote it?
- Have you ever had your company valued by a professional? Did you know that as many business owners undervalue as overvalue their companies?
- Did you know that an ESOP can supplement a sale to an Insider(s) (including family members) and an estate planning disposition of your company?
- Did you know that you can sell all or a portion of your company to an ESOP today and subsequently sell the company to a 3<sup>rd</sup> party?
- Did you know that an ESOP is the most tax-efficient strategy for getting cash out of your company to pay financial obligations under a divorce decree and avoid having to sell your company or give stock to an ex-spouse?

### **For more information contact:**

Kelly O. Finnell, J.D., CLU, AIF®  
Executive Financial Services, Inc.  
7660 Poplar Pike, 2<sup>nd</sup> Floor  
Germantown, TN 38138  
Phone: 901.259.7979  
Email: [kfin@execfin.com](mailto:kfin@execfin.com)  
[www.esopcoach.com](http://www.esopcoach.com)