

Excel Legacy Group Provides Legal Help to Companies in Structuring and Financing ESOP Transactions

The nation's leading provider of comprehensive ESOP services continues its commitment to aiding companies across industries in establishing and funding ESOPs



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[Group, LLC \(ELG\)](#), a leading ESOP service provider, assists companies in the complex legal process of structuring and financing Employee Stock Ownership Plan (ESOP) transactions. With a rich history of serving a diverse range of industries, ELG is dedicated to empowering businesses through employee ownership.

Ms. Patti Plough, President and CEO of ELG, states, "Our professionals are adept at aligning the interests of business owners, the company, and its employees to foster successful employee ownership outcomes. Through our affiliated attorneys, we ensure that the legal aspects of ESOPs are handled efficiently, focusing on reducing fiduciary risks."

"With over 75 years of combined experience, our team has implemented ESOPs for more than 200 companies across the nation, from transportation and construction to finance and real estate," adds Plough.

ELG offers a full range of services to simplify the ESOP journey, including:

- **ESOP Design & Installation:** Collaborating with company management to tailor an ESOP that aligns with business objectives and employee aspirations.
- **ESOP Administration:** Providing full-service post-closing administration for seamless ongoing management.
- **ESOP Feasibility Studies:** Customized studies to assess the financial viability of an ESOP for businesses, lenders, and advisors.

- Repurchase Obligation & ESOP Success: Offering clear financial insights and actionable intelligence through actuarial and valuation expertise.
- M&A Advisory: Guiding companies through the complex world of ESOP buyout transactions.

“ELG’s expertise in ESOP is second to none,” says Dave Vasudevan, Vice President of Digislate Inc. “Your dedication to employee ownership is truly inspiring. Thank you!”

Since its inception in November 2020, ELG has established a formidable presence in the ESOP landscape. The company, celebrating its 3rd anniversary, is distinguished by its seasoned consultants, attorneys, and financial professionals.

In its commitment to educate and empower businesses about ESOPs, ELG is offering its insightful e-book 'Sell Your Company Twice...' for free. This resource explains the unique benefits of ESOPs, including tax advantages, the process of the first sale with warrants, and the 'second bite of the apple'—a chance for selling shareholders and key employees to share in the equity value of a tax-free entity. To obtain a free copy of 'Sell Your Company Twice...', visit ELG's website.

To learn more about ELG's comprehensive ESOP services, call 1 (414) 750-2901 or visit [excellegacygroup.com/blog](https://www.excellegacygroup.com/blog) and [excellegacygroup.com/about](https://www.excellegacygroup.com/about).

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About Excel Legacy Group, LLC:

At Excel Legacy Group, LLC (ELG), we strive to provide the highest quality, most comprehensive ESOP services to help our clients in achieving their goals for their ESOPs. Our consultants, lawyers, and investment bankers help companies determine whether and how to establish and finance new ESOPs. Lastly, upon completion, ELG will organize and execute a company event to celebrate and communicate these new changes to your employees and communities.

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