

ESOP AND MANAGEMENT BUYOUT EXPERTS - Sample Profiles



Unique ID	684664319		
Firm Location (City)	Portsmouth		
Firm Location (State)	NH		
Firm Location (Zip)			
Your firm's geographic range (where you will accept clients from)	New England, NY/NJ and PA.		
General description of your firm's offerings	We are a boutique business consulting firm helping owners determine whether an ESOP is a fit for their business and personal needs. We provide various services including business assessment valuations as well as negotiation services in the ESOP and selling process.		
Specific services or niches your firm specializes in	We believe that an ESOP offers an excellent alternative to selling to a competitor or to private equity. An ESOP also provides an excellent benefit for employees, helping create an all inclusive culture where the entire employee base can be striving for a common goal - the ongoing success of the business.		
How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.)	For ESOP consulting, our firm charges by the engagement on a modular basis as we progress through the various stages of the ESOP process.		
Do you do free initial consultations? 30 mins, 60 mins?	To decide whether an ESOP may be a fit for your and your businesses needs, we offer a free unlimited education consultation for you and your key employees.		
Number of employees in your firm	We are a boutique firm. We employ two consultants, however work with various other professionals on an as-needed basis.		
What makes your firm unique?	Our firm is made up of not only consultants, but university professors who teach this material. In addition, both people associated with our firm have created, sold, run and invested in a number of different companies in a number of different industries. We have a breadth of knowledge and experience and understand the business owner from their perspective.		
Minimum Client size (# of Employees / Revenue / EBITDA etc.)	For an ESOP to make sense, business revenue must be at least \$5,000,000 annually with at least 15 employees and an EBITDA of 15%.		
Industries Services (All or Specific)	Our primary niche markets include manufacturing, engineering, architectural, construction and service firms, all of whom are the best target companies for an ESOP.		
Other criteria in choosing your prospects	We work with people whom we like and who are discerning business owners looking for optimal and precise service. We believe in not wasting people's time as much as we prefer not to have our time spent in an inefficient manner.		
Number of years experience in your field	25+		
Industry Designations (CFP, CLA, CPA etc.)	CM&AA, CFP®, CVGA, CEP®		
Best times to contact you			
Preferred Communication Methods	In Person, Email, Zoom / Skype etc.		
Elevator Pitch / Anything prospective clients should know about you?	We transform good companies into great enterprises.		