



MENKE

ESOP ADVISORS SINCE 1974

MENKE ESOP ONLINE SERVICES

The Menke Group

ESOP Advisors and Administrators
for 50 Years

menke.com



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The particular advantage we offer is that, unlike other administration firms, we provide all the services needed in connection with the ongoing upkeep and administration of an ESOP, including legal consulting, financial consulting, recordkeeping, and employee communications.

John D. Menke, Esq.

President, The Menke Group





MENKE ESOP ONLINE SERVICES

Save time and effort | Empower your employees | Engage service providers

Companies often struggle with the time-consuming and resource-intensive tasks of ESOP administration and employee communication.

Menke ESOP Online Services offers the solution.

Our secure online platform lets you streamline your ESOP compliance responsibilities while helping you effectively communicate the value and benefits of your ESOP to your employees.

Menke ESOP Online Services is SOC* II Type 2 compliant, demonstrating our commitment to secure management of private client information.

In addition, Menke undergoes rigorous SOC I Type 2 compliance assessment, which examines the effectiveness of our internal controls for delivery of third party administration (TPA) services.

Menke ESOP Online Services is our investment in your ESOP journey and evidence of our ongoing dedication to enhancing the ESOP experience for your company and your employee-owners.

* [Service Organization Control \(SOC\)](#) reports are produced by an independent certified public accounting firm following a comprehensive evaluation of an organization's internal controls.





WHAT ARE THE 6 MAIN BENEFITS OF MENKE ESOP ONLINE SERVICES?

- 1 Secure, private, mobile-friendly online platform with your branding
- 2 Fiduciary vault with convenient access to plan documents, notices, reports, and forms
- 3 Safe electronic exchange of sensitive data
- 4 Annual administration status tracking
- 5 Easy-to-use online planning tools for your employees
- 6 Your Menke ESOP Success Score™ to measure the sustainability of your ESOP cashflows





STREAMLINE ESOP ADMINISTRATION

MENKE

Safe and secure SOC I and SOC II compliant online platform enables secure storage and exchange of sensitive ESOP-related records, business and employee data.



On-demand access to plan provisions summary and distribution policy.



Online approval of distribution calculations.



Annual administration status bar to track progress and estimated completion dates.



Your Menke Team's contact information is in one place, making communications fast and easy.



Instant, on-demand query of employee census information, account balances, allocations, and more.



ESOP University with on-demand educational content on “all things ESOP.”



Menke ESOP Success Score™ projects your future ESOP cash flows and your repurchase obligation in an easy-to-understand, actionable format.





EMPOWER EMPLOYEES

MENKE

Easy-to-use dashboard offers up-to-date plan details and allows employees to update their personal information instantly.



Access to account information including allocated shares, share price, other investments in the ESOP, vesting, and account balance.



On-demand access to required plan disclosures, including Summary Annual Reports, Summary Plan Description, Distribution Policy, Notices and Committee Announcements.



Beneficiary Designation management at employee fingertips including viewing current details and making updates, all from one convenient location.



Digital archive of historical statements.



In-platform notifications to inform employees of eligibility for distributions with supplemental tools to begin the distribution process.



ESOP Calculator allows employees to model the future value of their account using an array of customizable assumptions for informed decision-making.



ESOP Education Center and FAQs section provides valuable insights into the benefits offered by your ESOP, helping employees unlock its value and find answers to common questions.





ENGAGE YOUR EXTENDED TEAM

MENKE

PLAN AUDITORS/ACCOUNTANTS

Help your plan audit team by providing direct access to plan reports, including detailed breakdown of calculations and compliance tests.



TRUSTEES

Enable your Trustees to effectively fulfill their responsibilities by providing them full or curated access to plan reports, distribution details, and additional relevant data.



OTHER ADVISORS

Empower your advisory team by granting them access to plan governance documentation and secure, fast, and efficient exchange of confidential documents and reports.





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We have received nothing but positive feedback from our employees regarding the convenience and functionality of Menke's online ESOP portal, and everyone is excited about the benefits of using the participant portals going forward.

Ken Oakley, CPA

Chief Financial Officer

ReCon Management Services, Inc.





MENKE MEANS ESOP

Menke is your single source provider for all ESOP services.

We understand ESOP firms because we *are* an ESOP firm.
The Menke Group is proud to be 85% ESOP owned.

America's Oldest & Largest ESOP Advisor

- 50 years in the ESOP business with over 50 ESOP specialists.

Most ESOP Clients

- Advised over 4,000 ESOP companies.

Most Sophisticated Online ESOP Administration

- Multi-million dollar investment in technology and infrastructure.

Most ESOP Clients Served

- 800+ ESOP clients and 300+ valuation clients.

1 of 5

Menke Creates
1 Out of Every 5
ESOPs in the US.





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