



JOHN STONE, CPC

Senior Consultant

Areas of Expertise

ESOPs

Defined Contribution

Plan Design

Plan Compliance

Recordkeeping

Retirement Consulting

401(k) Plans

John has over 30 years of experience in the design, funding, administration, and regulatory compliance for defined contribution plans. John provides consulting and administration for ESOPs with closely held stock and publicly traded stock. His recent project experiences include recordkeeping and consulting services for a privately held company with over 17,000 participants and a publicly traded company with over 10,000 employees in a KSOP. John has experience working with both C Corporations and S Corporations. He works with both leveraged and non-leveraged ESOPs. An area of focus includes helping ESOP clients manage their distributions and repurchase liability by assisting with a well-crafted distribution policy and understanding alternative approaches. He is a member of the firm's ESOP Practice Group.

Education

University of Wisconsin - Madison, Madison, WI — BS, Mathematics and Actuarial Science

What's Your Passion?

I love the outdoors including hiking, camping, biking, and kayaking, especially with my four sons. I also love to watch sports including college football, basketball, and hockey (Go Badgers!); as well as professional football and hockey (Packers, Titans, and Predators). I love to travel to see new places.

Professional and Community Involvement

- American Society of Pension Professionals and Actuaries (ASPPA)
- ESOP Association
- National Center for Employee Ownership (NCEO)

Contact Me

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