



JOHN STONE, CPC

Consultant, Defined Contribution

Areas of Expertise

ESOPs

Defined Contribution

Plan Design

Plan Compliance

Recordkeeping

Retirement Consulting

John is a consultant in the Nashville office of BPS&M. He has over 32 years of experience in the design, funding, administration, and regulatory compliance for defined contribution plans. His specialty client practice areas are ESOPs and 401(k) plans. John provides consulting and administration for ESOPs with closely held stock and publicly traded stock. Recent ESOP projects 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 their KSOP. John has experience working with both C Corporations and S Corporations. He also works with leveraged and nonleveraged ESOPs. An area of focus includes helping ESOP clients manage their distributions and repurchase liability by assisting with a sound distribution policy and understanding alternative approaches. He is a member of the BPS&M ESOP Practice Group.

Education

University of Wisconsin - Madison, Madison, WI — B.S., Mathematics and Actuarial Science

Professional and Community Involvement

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

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