

# Go EO

Cautionary Tales

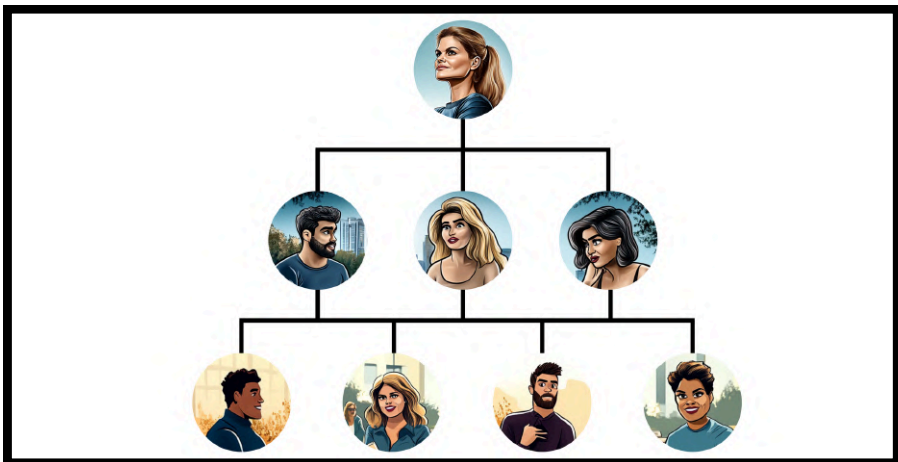
## Generous Jenny



Jenny's benevolence turned her dream of equality into a nightmare. But was her trust in others her biggest mistake?



Even though Jenny was the Founder and MD, she treated every employee like an equal, valuing their contributions.



But as the sole owner, she knew the reality was different – they weren't equals.



She learned about Employee Ownership Trusts (EOT) and saw a chance to level the playing field.



Even though the company was valued at £1 million, she transferred 100% of her shares to the EOT - for free!



Jenny gifted her shares to the EOT for nothing - making everyone a co-owner.



Everything went well for the first year. Everyone was working hard towards the same goals.



But some employees saw an opportunity...  
they discussed selling the company to  
a buyer.



Jenny was against it. This wasn't what  
she'd intended. The business was sold  
and proceeds split among employees.



Jenny's Lawyer explained that as an excluded participator, she wouldn't get any of the proceeds.



Feeling betrayed and depressed, Jenny realised the company she loved was gone, forever.

# Moral of the tale



Even though your motives may be pure, you should set up an EOT that protects you, is tax efficient and protects your business' legacy.

## What if Jenny had sold the shares and worked for a low salary?



If employees tried to sell the business, she'd still receive the **business sales proceeds**.



Jenny works hard, adding value for a **modest salary**.



**More tax efficient.** Salary is taxable, the sale value isn't.

# Go E.O.

Employee Ownership **made easy**



EOT sales from  
£6,990+VAT



Complete sale  
in 2 months



Our Founder made  
this journey

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