



TIM JOCHIM

Partner

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SERVICES

Business Services
Business Succession
Closely Held & Family-Owned Businesses
ESOPs (Employee Stock Ownership Plans)
Employee Benefits & ERISA
Mergers & Acquisitions

EDUCATION

University of Akron School of Law, J.D.
University of North Dakota, B.A., M.A.

LICENSED TO PRACTICE

Ohio
United States Supreme Court

RECOGNITION

Recognized by Chambers & Partners USA (band 2) as an authority on ERISA and ESOP law and its application to closely held businesses
Earned a rating of AV Preeminent from Martindale-Hubbell Fellow of the American College of Employee Benefits Counsel

OVERVIEW

Tim Jochim is a national authority on business succession and ESOPs and a trusted advisor to clients in succession planning, business transactions, legacy planning and corporate governance. He also has expertise in mergers and acquisitions, corporate finance, employee benefits and corporate tax. He is a frequent speaker to business and trade organizations on business succession, ESOPs and corporate governance. As to the latter, Tim's expertise and judgment are frequently requested in the capacity of an outside or independent Director for ESOP companies.

Tim is a former adjunct professor of corporate finance at Capital University School of Law and of business policy at The Ohio State University. Tim is a member of the Public Policy Council and the Legislative and Regulatory Committee of The ESOP Association and is co-founder of the Ohio/Kentucky Chapter of the Association. He is also a member of the Association for Corporate Growth and the National Center for Employee Ownership. Tim is also known as the "Godfather" of ESOPs in Ohio.

Tim is a graduate of the University of North Dakota (B.A., M.A.,) and the University of Akron School of Law (J.D.). He is admitted to the Bar of Ohio and of the United States Supreme Court.

Tim is recognized as an authority on ERISA and ESOP law and its application to closely held businesses by Chambers & Partners USA (band 2) and has earned a rating of AV Preeminent from Martindale-Hubbell. He has also been inducted as a Fellow of the American College of Employee Benefits Counsel.

Tim is the author of one of the first books on ESOPs and has published a number of articles related to ESOPs, employee ownership and business succession. These include:

- "Corporate Governance in ESOP Companies," *Financier Worldwide*, February 2011.
- *Employee Stock Ownership and Related Plans*, published by Greenwood Press, 1982.
- "The Repurchase Obligation," *The Journal of Employee Ownership Law and Finance*, Fall 1998.
- "S Corporation ESOPs," *Taxation for Lawyers*, September-October 1998.
- "S Corporation ESOPs," *Taxation for Accountants*, July 1998.

PRESENTATIONS

- "A Playbook for M&A Success," The Entrepreneurship Institute, 2022
- "[Business Succession and ESOPs](#)"
- "Considerations for Business Owners Thinking About Selling to an ESOP," 34th Annual Ohio Employee Ownership Conference, 2020
- "[Selling Your Business to an ESOP](#)," OEOC Owners at Work Podcast – Episode 9, 2020
- "ESOPs: Do It Right," The Fall ESOP Forum National Center for Employee Ownership, 2020
- "Assessing ESOP Feasibility," National Center for Employee Ownership, 2018

ASSOCIATIONS

- Member, Employee Stock Ownership Plan Association's Legislative and Regulatory Committee
- Member, Employee Stock Ownership Plan Association's Public Policy Council
- Co-Founder, Employee Stock Ownership Plan Association's Ohio/Kentucky Chapter
- Member, Association for Corporate Growth
- Member, National Center for Employee Ownership