

Comprehensive Services Over an ESOP's Life Cycle



About Us

Boulay works with individuals, closely-held businesses and public companies who are, or who aspire to be financially successful. Our focus is to protect your business, build your wealth and secure your future by partnering with you and integrating our depth of experience in accounting, tax and financial consulting services designed to “help you get there.”

Founded in 1934—today we have over 150 staff, including 30 partners and 90 Certified Public Accountants. We’ve experienced a long history of consistent growth in revenue, employees, clients and practice areas. We rank 12th in the Minneapolis/St. Paul Business Journal’s Book of Lists. We were also named a 2014 Best of the Best CPA firm by INSIDE Public Accounting.

Boulay is a member of PrimeGlobal, an international association of independent accounting firms with 2,100 partners, 17,000 staff, and more than 750 offices in 90 countries around the globe, making the association one of the Top 5 largest associations of independent accounting firms in the world. Boulay’s membership offers clients access to trusted people who can help you get your business done around the world – anytime, anywhere, any way.

Individual Owner

Services

- ESOP Feasibility Study
- Estate and Gift Planning
- Family Partnership Planning & Administration
- Charitable Gift Planning
- Wealth Management
- Family Office Services
- Gift, Income and Estate Tax Return Preparation
- Estate Administration

Corporation

Services

- ESOP Feasibility Study
- Succession Planning
- Deferred Compensation Arrangements
- C or S Corporation Planning
- Loan Financing Analysis
- Accounting, Assurance & Tax
- Merger & Acquisition Consulting
- Repurchase Liability Studies

ESOP Plan

Services

- Contribution Planning
- Loan Financing Analysis
- Employee Communications
- ESOP Plan Administration
- ESOP Plan Audit
- Termination or Retirement Plan Consulting
- Distribution Planning
- Repurchase Liability Studies