

EOTexpert

In association with
SPENCER WEST

EOT assured

Supporting your company to stay compliant and confident in its employee ownership status.

Employee Ownership
delivered by

Christian Wilson

About EOT assured

Running an employee-owned business is an exciting prospect. Whether you are a trustee, director, founder, or MD, you want to focus on business benefits, not compliance concerns.

EOT Assured is a service that has been developed with you in mind. Removing the guesswork around technical obligations, and providing a comprehensive resource - including video explainers, check sheets and policy templates - which gives user-friendly and practical answers whenever you need them.

Designed to eliminate the friction points that cause sleepless nights for business leaders, **EOT assured** is the 24/7 knowledge base for your employee ownership journey. Developed by EOA advisor member and implementation specialist, Christian Wilson, drawing from his extensive experience guiding ambitious companies to harness the numerous opportunities of employee ownership.

EOTexpert

In association with
SPENCER WEST

© 2026 EOT expert

Do we need EOT assured?

Accessible expert guidance from a specialist provides more than just peace of mind for your key stakeholders; it mitigates significant risk.

Employee ownership is often new territory for company leaders, and amid the demands of governance, compliance and implementation, confusion around obligations can, and does, happen.

The potential for a company to unwittingly trigger a ***Disqualifying Event*** is not to be taken lightly and will likely result in the clawback of the EOT CGT tax incentive and the loss of the employee bonus Income tax benefit. This risk is significantly reduced, where a company has taken on **EOT assured**.

EOTexpert

In association with
SPENCER WEST

© 2026 EOT expert

Your EOT assured package

EOT assured provides three levels of retainer support to provide your business with everything you need to stay cool, calm and collected.

Basic

EOT cool

Essential post-transition reassurance.

Access to guidance notes, video explainers, check sheets and policies. Plus quarterly group video meetings to share experiences and knowledge. Access to solicitor advice on technical points (additional fees may apply).



Better

EOT calm

Enhanced support for compliance.

Adding to your essential cover with company secretarial support, maintenance and filings of trust company documents (confirmation statements and appointments of trustee directors). A more dedicated reassurance for your EOT.



Best

EOT collected

Total peace of mind.

All the reassurance of EOT cool and calm with the addition of company secretarial support for the principle company owned by the EOT. Governance sorted, compliance checked and EOT assured!



What's included

	 EOT cool	 EOT calm	 EOT collected
Access to guides, checklists, explainer videos	✓	✓	✓
Template documents	✓	✓	✓
Quarterly Q&A session	✓	✓	✓
Discount on legal rates for EOT related work	✓	✓	✓
Updates on law changes	✓	✓	✓
Electronic holding of Trust Company registers	-	✓	✓
Trust Company Filings	-	✓	✓
Confirmation Statement	-	✓	✓
Trustee appointments / resignations	-	✓	✓
Trustee Independence Requirement checks	-	✓	✓
Access to resources	MD + one trustee	MD + all trustees	All directors + trustees
Legal telephone / email / online advice	-	30 mins / month ¹	60 mins / month
Electronic holding of Principle Co. registers	-	-	✓
Director appointments / resignation	-	-	✓
Company Confirmation Statement	-	-	✓

¹ Calls only - does not include drafting

EOT assured content

Current content available to subscribers, with new content added monthly.

EOT bonuses

Videos, guides and template documents:

- Understanding the EOT bonus
- Eligibility for the EOT bonus
- The Office Holder Test
- EOT bonuses and founders
- Exclusions from EOT bonuses
- EOT bonus communication to employees example
- EOT bonus checksheet
- Bonus Scheme

EOT Disqualifying Events

- Briefing note on Disqualifying Events
- How to work out your EOT Disqualifying Event date

EOT Trustee resources:

Videos, guides and template documents:

- EOT Trustee director
- Trustee director personal liability
- Trustee Independence Requirement
- Understanding your role as an EOT trustee
- EOT board agenda with notes
- EOT board agenda

EOT General Guides

- Deferred Consideration under EOT – accounting treatment
- You've completed, what next?
- Trustee Considerations when evaluating a third party offer for the sale of the EOT

EOT assured fees

Monthly retainer	 EOT cool	 EOT calm	 EOT collected
Companies up to 30 employees; turnover up to £10m	£150	£275	£400
Companies up to 100 employees; turnover up to £30m	£200	£325	£450
Companies over 100 employees; turnover over £30m	<i>Please enquire</i>		

Notes

1. No minimum sign up and cancellation at any time.
2. All services are delivered through Spencer West LLP, providing a level of legal privilege in respect of insured advice and guidance and giving clients access to Spencer West lawyers with broad expertise, operating in multiple jurisdictions across the globe.
3. Resources must not be shared beyond the company without prior agreement.
4. Company registers will be created electronically from Companies House documents; on termination of service, will be provided as an electronic pdf pack.

EOT assured contact

To find out more about the services offered, visit EOTexpert.co.uk or connect with employee ownership advisor, Christian Wilson, using the channels below.

Technical expertise. **Reassuringly human.**



christian.wilson@spencer-west.com



[07794 120660](tel:07794120660)



[+44 \(0\) 20 7925 8080](tel:+44(0)2079258080)



[connect with me](#)



Employee ownership delivered by

Christian Wilson