

# Levridge Equity and Patronage System Checklist

## Are you ready to simplify complex co-op management?

Use this checklist as a tool to help you identify priorities and tasks you have for your current equity and patronage system.



### Retirement and Estate Planning

- What are your retirement settings?
- How is estate planning managed?



### Membership Details

- How many patrons/equity participants do you have?
- Is there a need for a member portal?
- Are members allowed to lease shares?



### Equity and Stock Management

- Do you manage stock and equity separately?
- Do you perform equity and stock transfers?
- Are stock certificates tracked, and are physical certificates required?
- How are liens on stock and equity managed?



### Payment, Allocations, and Tax

- How is patronage calculated?
- What factors influence patronage calculations?
- When and how often are allocations done?
- Are unit retains and patronage on separate pay-out schedules?
- Who approves revolvments/payouts, and what is the approval process?
- How timely are you in paying out allocations?
- Is PATR/tax information printed in-house or by a third party?