Levridge Equity and Patronage

Reap the benefits of a system that reduces administrative burden, improves accuracy and compliance, and increases member satisfaction.

Levridge Equity and Patronage is a Software-as-a-Service solution to manage stock classes, equity allocations, equity balance tracking, patronage refund management, and provides a co-op member platform to handle tax form management.

Cloud-based solution to solve the complex shareholder accounting challenges of Cooperatives.

Equity Tracking
Manage new equity distribution, the percentage retained, amounts allocated to members as equity, and amounts set aside as patronage refunds.

Equity Revolvements
Track and manage member revolvements to return historic equity to members triggered by an event or the ongoing operation of your co-op.

Member Management
Improve member satisfaction with 24/7 access for members to view their equity status, current patronage refunds, cast votes for co-op board of directors, and access tax forms.

Patronage Management and Reporting
Manage the details of patronage payments (e.g., splits between members), determine whether dividends are qualified or non-qualified, and generate each member's annual 1099-PATR form.

Streamlined Setup
Simplified setup guides you through importing members, equity balances and shares, and allocation and payment histories.