



The Beacon

CAUTION: Interactive Content Ahead!

by Aaron Moberger, NE Chapter President



Dear New England Chapter member,

We are just a couple weeks from our annual [Spring Conference](#)! We designed this conference's content based on your feedback from the Fall Conference, which led to our theme:

Caution: Interactive Content Ahead!

We want you to leave with 3 doable ideas, 3 big ideas, 3 lofty and likely to fail and learn trying ideas!

We heard you loud and clear and developed the Spring Conference to include as much interactive and workshop content as possible. Most of your feedback came directly from Fall Conference survey responses. We appreciate your responses and take them to heart and, indeed, participating in those surveys is one of the best ways for you to influence the future content of our conferences. Please continue to deliver your feedback and take advantage of our new and improved survey template at the Spring Conference.

We are also pleased to welcome back in person roundtable sessions, beginning with our [CEO Conference](#) on April 7th and 8th in Newport, RI. Visit the link above for more information and to register, and stay tuned to our chapter [events page](#) for forthcoming information on CFO and HR roundtables. As always, we are indebted to our friends at Praxis Consulting Group for facilitating these sessions.

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Despite calls for and emphasis on in-person events, virtual events, which we relied on during the pandemic, continue to be an important tool we can use to reach members who might not be able to attend a conference in-person. We intend to offer more virtual sessions to members, beginning with one in April based on a popular topic from our most recent Fall Conference. Stay tuned for more information, and look for more virtual session offerings to include leadership, engagement, and continuous improvement.

Our **virtual session series** is the first in a series of new initiatives from our newly formed **Volunteerism and Engagement Committee**, a subcommittee of our chapter officer group. We formed this committee to address the welcome and timely challenge of reengaging our members following the pandemic's restrictions on our time and energy. If you have more suggestions on initiatives or content, please drop us a line at one of the links below, or let us know in person at the Spring Conference!

Registration is now open for [TEA's National Conference 2022](#) in Washington, D.C. The National Conference is not only a leading source of presentations and networking opportunities, but also one of our best opportunities to [advocate](#) for ESOP priorities with our legislators.

As always, we, your staff in the New England Chapter, are here to help you get the most from your ESOP Association membership. If you need anything or just have a question, please feel free to reach out to me at amoberger@harpoon.com or contact another [New England Chapter volunteer](#); check out our NE Chapter network on [The Hub](#) to connect with other chapter members; and stay tuned to our Twitter ([@ESOPNE](#)) for the most recent ESOP news in our chapter and across the country. I look forward to continuing to work with you all and hope to see many of you in Burlington at the Spring Conference.

Finally, our thoughts are with the citizens of Ukraine and their loved ones. Ukrainians' acts of courage and heroism in the midst of Putin's tyrannical violence are as moving as they are now infamous. **We stand with Ukraine, and pray for their just and decisive victory.**

Sincerely,

Aaron Moberger

President, New England Chapter

UPCOMING EVENTS

1 NEW ENGLAND CHAPTER 2022 SPRING CONFERENCE

March 21, 2022
Boston Marriott Burlington
Burlington, MA

2 NEW ENGLAND CEO SPRING CONFERENCE

April 7 - 8, 2022
Castle Hill Inn
Newport, RI

More info at:

<https://www.esopassociation.org/chapters/new-england>

You can also contact
Rita Tucker, Chapter Executive
rtucker@esopassociation.org

WELOME, NEW MEMBERS!

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We are thrilled to welcome the following members to the New England Chapter ESOP Association:



SEND US YOUR NEWS!

Have a newsworthy event at your Company? Forward any pictures or articles to us and we will be happy to share your news with the rest of the Chapter. Contact Jessie Jamison, VP of Chapter Communications at NE-Chapter@esopassociation.org



The New England Chapter is proud to present the:

2022 SPRING CONFERENCE

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WHEN? March 21, 2022

WHERE? Boston Marriott Burlington
One Burlington Mall Road
Burlington, MA 01803

WE HOPE YOU'LL JOIN US!

The New England Chapter of The ESOP Association is pleased to announce a Spring in-person event to engage Chapter members with an educational and networking opportunity. The Programming Committee worked hard to provide you with an agenda of great content including technical, communication/culture and leadership topics.

[Click here to view the full the agenda!](#)

REGISTER



THIS CONFERENCE WILL BE INTERACTIVE!

- **Come generous** - Be ready to share & create new ideas for bolstering NE ESOPs.
- **Come selfish** - We want you to leave with 3 doable ideas, 3 big ideas, 3 lofty and likely to fail and learn trying ideas.



by Danielle Moody

Moody's Collision Centers began as "Moody's Body Shop" in the fall of 1977 at its current Gorham location. Shawn Moody, then a senior at Gorham High School, had a vision of providing service to local residents that exceeded their expectations. As such, he launched Moody's out of a small three bay garage.

With over 200,000 vehicles repaired and growing, Moody's philosophy centers on community support, customer loyalty and co-worker dedication.

The real strength of Moody's is in our co-workers. We have the most dedicated, committed, and qualified co-workers in the industry. They care about you, your vehicle and the quality of the workmanship Moody's performs. Because Moody's is employee owned, each and every co-worker has a stake in the business and therefore a vested interest in being the best that they can be.

Moody's co-workers all have a key to the respective facility they work; no one that works at Moody's has ever "swiped" a time card or "punched" a clock. We believe and promote **co-worker ownership with responsibility to each other.**



Every quarter Moody's holds a meeting at which all co-workers are presented the company's financial performance as well as 10 other Key Performance Indicators (KPI's) that range from our Customer Satisfaction results to our Efficiencies and Utilization, etc. **Everyone has an opportunity to share his or her suggestions, ideas and feedback.**

"Open book management" is one of the pillars on which we've built our ESOP foundation. We live it, breathe it and promote it."

I had been working as a coworker at Moody's Coworker Owned for two years when I took a position with our Resource Management Team. This new position involved the responsibility of ESOP Administration. The complexity of working with many different professionals and the legal implications were daunting; however, at that time, Moody's had been an ESOP for 9 years and had built an incredibly knowledgeable professional team to support us.

I was encouraged by that team to attend a conference being held by The ESOP Association. At that first conference, I remember

being amazed to hear **attendees speaking so passionately about their companies and their coworkers,** I recognized immediately it was a community that I wanted to contribute to. I've had the great fortune of developing these relationships through volunteerism.

The ESOP Association has invested in me through my appointment as the Maine State Captain and welcomed my efforts at our Planning Days where we develop content for Chapter events.

The ESOP Association is made up of leaders within their own organizations and have a **true desire to see their colleagues succeed;** they inspire and motivate me to become a better leader for the coworker-owners at Moody's.

The New England Chapter is willing to invest in you, and the relationships you cultivate will drive you to that next level both personally and professionally.

Email our Chapter President, Aaron Moberger, if you are interested in taking your ESOP journey to the next level by becoming a leader within the New England Chapter ESOP Association!



NE Chapter Officer SPOTLIGHT



MEET JADE PALERMO!

V.P. of FUNDRAISING/SPONSORSHIPS

Manager at Empire Valuation Consultants

Where did you grow up?

I've lived in New Hampshire my whole life and have been in the Seacoast of New Hampshire for the past 10 years.

What was your very first job, and what did you learn from it?

My first job was with Dunkin Donuts. I learned the value of hard work and developed a love for coffee.

What is your favorite part of the work you do?

As a member of our ESOP Advisory Practice at Empire, I love learning about the employee-owned companies that we work with and the unique factors of the different industries that our clients participate in.

I also really enjoy getting to work with ESOP companies throughout the different stages of being an employee-owned business: from working with owners and shareholders in analyzing whether an ESOP is feasible for their business; through the actual formation of the ESOP as part of the transaction advisory team. I also enjoy working with companies each year as the valuation advisor to the trustee, and seeing how the business continues to evolve from year-to-year and how the Company develops their own employee-ownership culture.

Where would you like to go on a dream vacation?

I would love to visit the Dolomites in Italy, either to ski or hike, and hope to do so soon!

What are your hobbies outside of work?

I love to be outdoors and to try new things! I spend a lot of time in the mountains: backpacking, skiing, leading hikes, and climbing. At home, you can often find me tending to my gardens (with help from our friends at Gardeners Supply and Johnny's Seeds!).

What inspired you to become an Officer?

I was inspired by some of my colleagues and their passion for furthering the mission of employee-ownership, here in New England. I started contributing as a State Captain for New Hampshire, playing a role in organizing our advocacy efforts in Washington, D.C., and have since transitioned to Vice President of Fundraising, where I lead our Chapter's efforts to raise money for the Employee Ownership Foundation.

When you think about working for an employee-owned company, what makes you proudest or most excited?

I've spent much of my career helping companies become employee-owned, and never dreamed that I'd have the opportunity to become an employee-owner myself. In April 2021, Empire became 100% employee-owned, and I now have the pleasure of not only serving employee-owners but also being an employee-owner. As an owner, I'm proud to have a personal interest in the work that Empire does, and I'm excited to have a greater sense of ownership in the decisions we make and a stake in the results we achieve.



Current & past Chapter Officers at the SRCC in Colorado, Jan. 2020

MEET OUR NEW ENGLAND CHAPTER OFFICERS



AARON MOBERGER
President

Cellar Manager @ Harpoon Brewery



AMY HUOT
Immediate Past President

Manager, Product Intelligence & Process Support @ Proponent



SANDRA SMITH
Vice President - Programming

Vice President @ Atlantic Management Company, Inc.



JOSEPH VERRI
Vice President - Membership

Senior Vice President, Financial Advisor @ Morgan Stanley



BARBARA CLOUGH
Vice President - Advocacy

Senior Manager @ Crowe LLP



JESSIE JAMISON
Vice President - Communications

Marketing Coordinator @ Sebago Technics



JADE PALERMO
Vice President - Fundraising/Sponsorships

Manager @ Empire Valuation Consultants, LLC



RITA TUCKER
Chapter Executive

Chapter Executive @ The ESOP Association

MEET OUR NEW ENGLAND STATE CAPTAINS

CHRISTINE COOGAN

State Captain - MA

DANIELLE MOODY

State Captain - ME

ANTHONY BOI

State Captain - RI

JESSICA KINSEY

State Co-Captain - NH

JESSE TYLER

State Co-Captain - NH

CHRISTIE KANE

State Captain - VT

OPEN POSITION

State Captain - CT



BECOME AN OFFICER OR STATE CAPTAIN!

Are you interested in getting more involved with the New England Chapter? We are currently seeking passionate and enthusiastic individuals to become future Officers & State Captains! To learn more about this exciting opportunity, please contact Aaron Moberger, Chapter President, at amoberger@harpoon.com.

Thank you to our **2022** NEW ENGLAND SPONSORS

LEADERS



PROMOTERS



SUPPORTERS

Blue Ridge ESOP Associates

Devine Millimet & Branch, P.A.

DON'T SEE YOUR COMPANY LISTED?

Click [here](#) to view sponsorship opportunities.