

EMPLOYEE OWNERSHIP ACTION NETWORK

THE ESOP ASSOCIATION MEMBER

CAMPAIGN TOOLKIT



Contents

- 2 Welcome Letter from The ESOP Association
- 3 About the Employee Ownership Action Network (EOAN)
- 4 Simple Steps to Run an EOAN Campaign
- 4 Ways to Communicate About EOAN

TAKE THE

FIRST STEP

Join EOAN by simply scanning with your smart phone or visit:



esopassociation.org/eoan



The ESOP Association Government
Relations & Public Affairs
esopadvocate@esopassociation.org

Dear Member of the ESOP Association,

Your ESOP is important – it's not just your retirement account, it's a tool that helps your company and workforce succeed and one that can help strengthen our communities. The ESOP Association believes they should be protected, preserved, and promoted for both current and future generations. That's why we have Advocacy efforts at the federal, state, and local levels, and are sharing this helpful toolkit with your ESOP company or firm.

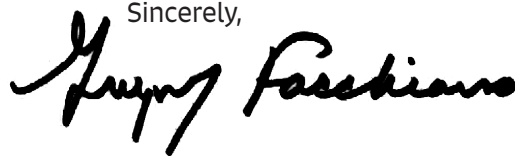
Employee ownership concepts and models date back to our country's birth, but ESOPs as we know them were largely created by the federal government starting in the 1970s. Federal regulation and tax treatment are their foundation, so ESOPs succeed when federal policies are clear, favorable, and commonsense. But ensuring public policy success takes a concerted effort — advocacy — and that effort includes employee owners like you.

Advocacy relies on several factors, but grassroots support and activity are key. Therefore, The ESOP Association created the Employee Ownership Action Network (EOAN). The Employee Ownership Action Network is the employee ownership community's grassroots army of employee owners and professionals fighting to protect ESOPs. By signing up you will receive important alerts when something arises that could impact your ESOP, and then be connected to your lawmakers so you can use your voice. If you care about your ESOP and are willing to share a little bit of time every now and again, then EOAN is your vehicle to help make a difference.

Best of all, EOAN is free and simple to join. Just sign up with your home address and then take action when needed. By growing EOAN, we grow the grassroots effort necessary to protect the ESOPs we have and promote and expand employee ownership for the future.

The attached toolkit of EOAN resources will help generate support for EOAN in your company or firm, and TEA staff are ready and willing to help you tailor these valuable resources to your needs. I hope you'll take the time to share this important information with fellow employee owners. Thank you for your support.

Sincerely,



Gregory Facchiano
*Vice President of Government
Relations and Public Affairs*

About EOAN

THE EMPLOYEE OWNERSHIP ACTION NETWORK (EOAN) IS A FREE-TO-JOIN, GRASSROOTS ADVOCACY MOVEMENT FOR ANYONE WITH A STAKE IN ENSURING EMPLOYEE OWNERSHIP CONTINUES TO GROW AND THRIVE IN THE US.

Why it Matters

Lawmakers want, and need, to hear from you and they respond to stories and messages from the people they represent. EOAN provides a unified and energized voice for our community with elected officials and creates dialogue for future issues. EOAN provides you with the information and tools you need to be an active participant on state and federal level.

How it Works

As an EOAN member, you will be provided real time advocacy alerts on issues impacting our community. In many cases we will send you an email, where you can follow a few simple steps to immediately generate a message from you to your elected official.

Successful grassroots advocacy starts with the individual. This Network was built to work for you and is quick, easy, and effective!

Get Started

Sign up now at esopassociation.org/eoan and encourage your colleagues and others in the ESOP community to join as well!

All members are required to renew registration annually to retain benefits. We will notify you if your membership is about to expire. By responding to an EOAN alert, opening an email from EOAN, registering for The ESOP Association's Advocacy Academy, you are agreeing to renew your membership to EOAN for one year from the date of action.

To terminate please email esopadvocate@esopassociation.org.

EOAN Member Benefits

- Real-time breaking news alerts: stay on top of the latest legislative and regulatory changes impacting Employee Ownership
- Fast and effective communication with leaders in state and federal government
- Quarterly policy updates from TEA's Expert Advocacy Team
- Access to exclusive learning and training opportunities

Simple Steps to Run a Successful EOAN Campaign

☑ **Make Your Plan**

- Download EOAN graphics and sample communications to share at esopassociation.org/eoan/shareables
- Make a roster to identify who you are reaching out to for easy follow up

☑ **Launch Your Campaign**

- Email ESOP participants to join/renew EOAN membership
- Track those who tell you they will sign up
- Personally call or email those who haven't

☑ **Be available for questions**

- Not sure how to answer? Email esopadvocate@esopassociation.org for help

☑ **Act when you receive an EOAN alert**

- This is the most important part, and it only takes a few minutes!

Enrollment Ideas

- Schedule a meeting or give a short explanation on advocacy and the Employee Ownership Action Network
- Contact The ESOP Association staff and have them conduct a webinar for your company
- Host a company lunch and have your colleagues sign up for EOAN at the door
- Have a booth at your next corporate event, contact The ESOP Association for handouts and other promotional materials

Ways to Communicate About EOAN

We have developed several tools that you can use to introduce EOAN to your fellow employee owners and ESOP professionals. Visit the Advocacy Academy and Advocacy Resource Library on the ESOP Hub at esopassociation.org/eoan/shareables to access the EOAN sample presentation, social media posts, recruitment emails, and images.

CONTACT THE ESOP ASSOCIATION

Please reach out to The ESOP Association Staff with any questions or comments about EOAN or ESOP Advocacy.

Greg Facchiano

Vice President, Government Relations & Public Affairs

gfacchiano@esopassociation.org

Nicole Reppert

Senior Director for Member Engagement and Advocacy

nreppert@esopassociation.org

To learn more about EOAN or to take action, visit esopassociation.org/eoan.