

Newsletter

A Note From Our President

Christy Magee, President

Hello,

Thank you to our over 100 attendees who joined us at the PA/DE Chapter Spring Conference in King of Prussia. I was impressed by the number of new attendees and the active participation in breakouts. Thank you again to our speakers and sponsors for another great Conference. We enjoyed adding C-Suite Roundtables back into our agenda along with our popular ESOP 101 and Women's Networking Event. We enjoyed learning about a local ESOP, Tunnel Consulting, a company doing fascinating work. <https://tunnellconsulting.com>

We are excited to be adding some more volunteer committee members to our Chapter Officer Group. We are looking to add more! The more members involved, the more relevant and beneficial our conferences will be as well as our Chapter communication, advocacy and FUN raising. Reach out to me or other Chapter Officers if you want to join in on the fun.

Our next local conference, The Regional Multistate, will be held at the Mohegan PA Casino Resort in Wilkes-Barre, PA on September 25-27th. We would love to hear your ideas, and we have emailed you the speaker proposal as we are looking for new breakout topics and facilitators. With so many new attendees we are hoping to have an ESOP beginners track. If you are new to ESOPs, let us know what you want to learn,

Being a speaker at our conference offers a platform to showcase your expertise, elevate your profile, and contribute to the advancement of the ESOP movement. If you possess valuable knowledge, strategies, or success stories that can inspire and educate our audience, we invite you to submit a proposal to speak at the conference by May 15th. Whether you are an experienced industry veteran, a pioneering entrepreneur, or an emerging leader, your voice has the power to shape the dialogue and drive positive change within our community.

We welcome proposals on a wide range of topics related to ESOPs, including but not limited to:

- Best practices in ESOP administration and governance
- Strategies for maximizing employee engagement and ownership culture
- Case studies and success stories from ESOP companies
- Legal, financial, and regulatory considerations in ESOP implementation
- Innovation and emerging trends in ESOP design and management
- Tools and resources for effective communication and education about ESOPs
- Challenges and opportunities in transitioning to an ESOP structure

Will I see you in DC May 7-10th at the National Conference? Look for me on Thursday, May 9th at the Chapter Breakout first thing in the morning, I know over a dozen of us are signed up to advocate on Capitol Hill.



COMPANY INFO



twitter.com/EsopPaDe



Make sure to join our LinkedIn group @The Pennsylvania/Delaware Chapter of the ESOP Association

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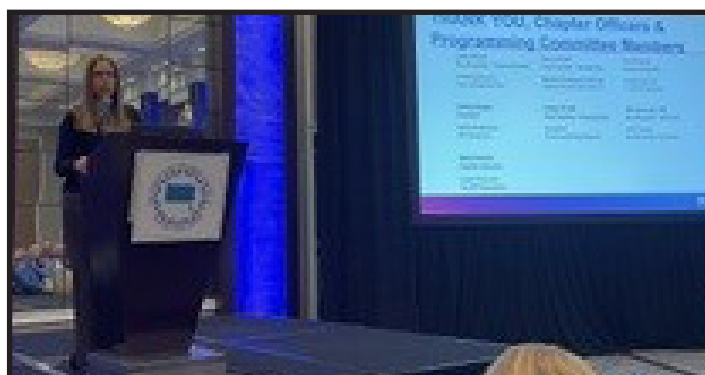
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SEND US YOUR NEWS!

Let's Stay Connected!

Please send in any pictures or activities your company is doing during this unique time that is helping keep your ESOP alive. You can tweet us at @ESOPPADE or email smw@valuemanagementinc.com





Advocacy

by Mike Borinski, VP of Advocacy

A wonderful gathering of the PA/DE Chapter at the Sheraton Valley Forge. Members were updated on the Advocacy efforts being conducted by the ESOP Association, including a simple sign-up to join EAON – the Employee Ownership Action Network. Now, more members of the PA/DE Chapter will be regularly notified about legislative developments affecting their companies and communities with the opportunity to communicate their position on those actions. Thanks to Greg Facchiano, the Association's VP for Government Relations and Public Affairs, members were treated to some official ESOP Association swag if they signed up to join the network on the spot.

Members were also briefed on how they can take part in the annual opportunity we have to make our case to those in Washington DC during the ESOP Association's National Conference May 7-10. Attendees will learn how to discuss key ESOP concerns with legislators and their staffs as well as meet the people directly representing them in their districts and states. Plus, by registering to participate, you'll get a \$250 discount on the conference registration. A number of Chapter Meeting participants have already registered to advocate with us next month. Won't you join us?

We have a variety of ways you can make a difference in what happens to ESOP Companies – all we need is for you to open the door to the many options you and your company can use. How important is your ESOP benefit?

EMPLOYEE OWNERSHIP
ACTION NETWORK

