

# Newsletter

## A Note From Our President

*Christy Magee, President*

Dear PA/DE Chapter friends,

Thank you to our 150+ attendees who joined in on the fun at the Multistate Regional Chapter Conference in Mohegan, PA. Networking with our 50+ First Time attendees at a special breakfast for them was one of my highlights. Along with friendly bidding competition at both the silent and live auctions where we raised almost \$3,000 for the Employee Ownership Foundation, networking at the receptions, fun at the Women's Networking event and a free concert by a Led Zeppelin cover band at the casino! I am thankful for all our sponsors, especially our Platinum Sponsors.

Thank you

Platinum  
Sponsors



Missed the Multistate? Be sure to check out upcoming National meetings and our Spring Chapter Meeting:



### The ESOP Association National Events

Visit [esopassociation.org/events](https://esopassociation.org/events) to learn more



**EMPLOYEE OWNED 2024**  
November 13-15 2024 | Las Vegas, NV  
The world's largest and premier Employee Ownership event. With world-class speakers, networking and educational opportunities, this is one conference you can't afford to miss!



**PROFESSIONALS' FORUM 2025**  
February 3-5, 2025 | Charleston, SC  
Join others who provide professional services to ESOP companies—including valuation, legal, and tax advice—at this special, interactive event. Compare notes on best practices and the latest legal and regulatory happenings.

**New Location!**



**TEA NATIONAL CONFERENCE**  
May 7-9, 2025 | Washington, DC  
Join and network with your fellow ESOP CEOs at our world-class program designed to prepare you to face your toughest challenges. Learn from leading keynote speakers and strategize at expert-led, specialized roundtables to develop solutions for the most pressing issues.



#### COMPANY INFO



[twitter.com/EsopPaDe](https://twitter.com/EsopPaDe)



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

#### OFFICERS

Christy Magee  
President  
215-826-1112  
[cmagee@dvlnet.com](mailto:cmagee@dvlnet.com)

Kara Smith  
VP of Membership  
223-322-7310  
[ksmith@hrg-inc.com](mailto:ksmith@hrg-inc.com)

Kelly Forester  
Chapter Director  
202-465-4232  
[kforester@esopassociation.org](mailto:kforester@esopassociation.org)

Mike Borinski  
VP of Advocacy  
609-790-3020  
[mborinski@bradfordwhite.com](mailto:mborinski@bradfordwhite.com)

Matt Hancock  
VP of Programming  
215-753-0303 ext. 119  
[matt@praxisCG.com](mailto:matt@praxisCG.com)

Susan Wilusz  
VP of Communication  
215-343-0500  
[smw@valuemanagementinc.com](mailto:smw@valuemanagementinc.com)

Kyla Alterman  
VP of Fundraising  
626-699-5501  
[kalterman@fiduciaryservices.com](mailto:kalterman@fiduciaryservices.com)

#### 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](mailto:smw@valuemanagementinc.com)



Continued on page 2



Continued from page 1

Looking forward to seeing you in Lancaster on March 25th! We are looking for a local Lancaster employee owned company to host a tour for conference attendees and/or be a keynote speaker at the conference to showcase the awesomeness of your company culture.

Finally, we have a lot of fun events planned for you in 2025 so please stay in touch. We are looking for more volunteers to advocate for ESOPs both at the TEA National Conference on May 7th in DC and new next year on a State level in Harrisburg next spring/summer. Can't make it? Then please consider the other TEA Government Relations Programs.

 <b>TEA Government Relations Programs</b>  TEA's political action committee that pools together contributions to support elected officials who promote the Employee Ownership agenda. <a href="https://esopassociation.org/PAC">esopassociation.org/PAC</a>	 <b>Corporate Council</b> The ESOP Association TEA member companies and professionals can directly provide critical advocacy resources to promote and protect the interests of the ESOP community and employee owners. <a href="https://esopassociation.org/Corporate-Council">esopassociation.org/Corporate-Council</a>
 A free-to-join, grassroots advocacy movement for anyone with a stake in ensuring employee ownership continues to grow and thrive in the US. <a href="https://esopassociation.org/EON">esopassociation.org/EON</a>	 Training employee owners to take action at ESOP Advocacy Day and providing resources year round to promote ESOPs and employee ownership. <a href="https://esopassociation.org/advocacy-academy">esopassociation.org/advocacy-academy</a>



**2025 ANNUAL AWARDS for COMMUNICATIONS EXCELLENCE**

For decades, the AACE Awards have put a spotlight on the best communicators in our community.

This is your time to shine!

Application Opens Early 2025  
[esopassociation.org/AACE](https://esopassociation.org/AACE)



	<b>SAVE THE DATE</b> Pennsylvania/Delaware <b>SPRING CONFERENCE</b>	 <b>March 25-26, 2025</b> <b>DoubleTree Resort Lancaster</b> <b>Lancaster, PA</b> More information coming soon
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# FUNd Raising

by Kyla Alterman, VP of Fundraising

This year's Multistate conference was full of opportunities to make deep connections with members of our local ESOP community. One of my favorite parts of the conference was participating in the communication round table meeting on the first day. The round table format is such a great way to learn directly from what other ESOP companies have tried and address the questions on everyone's mind. It was also a great way to break the ice for new participants and even myself: I found myself seeing those same people from the round table throughout the conference and it was great to have more friendly faces around to check in with or wave to throughout the conference. For a smaller conference, there was no shortage of educational tracks or fun things to do.



## Advocacy

by Mike Borinski, VP of Advocacy

I really enjoyed our Multistate Regional Conference at Mohegan Pennsylvania especially since I grew up in the Wilkes-Barre area. I'm very happy to see the vibrant ESOP Community that exists in Northeastern Pennsylvania as well as the participation from all the attendees throughout the four states covered in our conference.

Although no session was solely on Advocacy, let's all remember our right and responsibility to vote on November 5th. Your voice matters and it also counts on ESOP matters. 2025 will be an important year for tax legislation and defending existing ESOP treatment will be necessary. Your story matters! Share the wonderful benefit you enjoy as a member of an ESOP Company with coworkers, friends, and hopefully when you get an opportunity to speak with a legislator or their staff.