

Newsletter



A Note From Our President

Christy Magee, President

Thank you to our Spring Conference Attendees who enjoyed valuable educational breakouts, free time with knowledgeable professionals to ask questions, networking, and fun! What did you miss? Our Chapter Award Winners, helpful HR, and CEO/CFO roundtables where leaders shared questions and best practices. A Women in ESOP's Networking Event and an amazing keynote address from President & CEO, R. Bruce Carnevale of local ESOP, Bradford White Water Heaters.

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I hope to see you on Advocacy Day at the TEA National Conference May 5th-6th. Do you care about protecting your ESOP and your personal retirement wealth? You can do something about it: Join hundreds of employee owners in our nation's capital to secure your retirement!

On Tuesday, May 5, TEA's annual Advocacy Academy will prepare you to effectively communicate with your elected representatives. We'll give you the tools and knowledge you need to become an ESOP advocate within your company, your community, and in the political process. You'll hear from top political and public affairs professionals, who will educate you on the most relevant and timely online and in-person advocacy strategies.

On Wednesday, May 6, join me for our annual ESOP Advocacy Day, as hundreds of employee owners and ESOP professionals from across America visit with members of Congress to educate them on our core issues. Hearing how ESOP issues directly affect their constituents is one of the most effective ways to convince members of Congress to support ESOPs and employee ownership, and we hope you'll take part.



Nervous? So was I the first time I attended but now with the training and experience I have, I am confident and would love you to join my Advocacy Team and watch advocacy in action. Please reach out to me if you are still unsure. If not, see you there!

COMPANY INFO



twitter.com/EsopPaDe



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

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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



Spring Conference Photos



2026 PA/DE Annual Chapter Sponsors

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Chapter Awards

Employee Owner of the Year

Winner:

Jennifer Greevy
(Guttman Holdings)

Congratulations to all nominees!

Christopher Bauer (DVL Group)
Jeff Jury (H.B. McClure Company)

Company Owner of the Year

Winner: Guttman Holdings



Congratulations to all nominees!
DVL Group
H.B. McClure Company



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with an all-new benefit, exclusively for TEA members!



ESOP Employee Accelerator

The Employee Ownership Foundation (EOF) created the ESOP Employee Accelerator for non-managerial staff and new employee owners. This one-day, interactive program introduces core business concepts and ESOP principles in a dynamic, engaging format. Through classwork, small-group discussions, and hands-on exercises, participants learn how their daily actions influence company performance and long-term value.

New employee owners often ask, "How does our company measure success?" or "How can we impact its value?" The Accelerator answers these questions by building a strong knowledge base and fostering an ownership mindset. By the end of the program, participants gain practical insights into business operations, decision-making, and the wealth-building potential of their ESOP—and leave ready to make a meaningful difference.

www.EmployeeOwnershipFoundation.org

Tuesday, August 11, 2026

**@ Kreischer Miller
Horsham, PA**

LEARN MORE OR REGISTER:
www.TinyURL.com/Kreischer811

Tuesday, May 19, 2026

@ Avail Technologies, Inc., State College, PA

LEARN MORE OR REGISTER:

www.TinyURL.com/Avail519



Coming to State College, PA!

Strengthen your team's ability to think and act like the owners they already are. The ESOP Employee Accelerator develops practical business skills and supports a stronger ownership mindset in just one day.



August 11, 2026

**Host: Kreischer Miller
Horsham, PA**



SAVE THE DATE

Pennsylvania/Delaware Chapter

2026 LET'S TALK ESOPS

July 14, 2026

**KTA-Tator, Inc.
Pittsburgh, PA**



**NORTHEAST
Regional Conference**

New England | New York & New Jersey | Pennsylvania & Delaware

October 7-9, 2026

**Mystic Marriott Hotel & Spa
Groton, Connecticut**