

TO **SUCCEED** WITH EMPLOYEE OWNERSHIP

YOU NEED OBJECTIVE, RELIABLE INFORMATION ON TOPICS LIKE THESE:

- Long-term ESOP sustainability
- Alternative liquidity solutions for remaining private
- Court and regulatory rulings' effects on the feasibility of ESOPs
- Executive compensation at employee-owned companies
- Best practices in corporate governance
- Developing an effective ownership culture

JOIN THE **NCEO** TO GET THE INFORMATION YOU NEED TO SUCCEED

The NCEO is a self-sustaining nonprofit membership organization that provides practical resources and objective, reliable information on employee stock ownership plans (ESOPs), equity compensation plans, and ownership culture.



Join the thousands
of NCEO members
FOR ONLY \$90.
Visit nceo.org/join
or call 510-208-1300.

NCEO MEMBERS RECEIVE

- The *Employee Ownership Report*, our newsletter on ESOPs, equity compensation, and participation
- Weekly free webinars on ESOPs and equity compensation
- Access to the members area of our site, including a searchable newsletter archive, research reports, and our discussion forum
- The right to call or email with questions
- Discounts on our publications, conference, seminars, and other resources

“*Our company could not have become what it is now without key pieces of the puzzle coming from the NCEO.*”

—Jeff Schmehr, CFO, HdL Companies

nceo.org/join

NCEO MEMBERSHIP BENEFITS & RESOURCES

WEBINARS AND TRAINING

“Absolutely love the webinars. I can grow my knowledge without getting on a plane or driving for hours, and I can acquire continuing education credits in the process.”

—Anonymous NCEO member

Members receive free access to our ongoing series of live webinars, covering everything from the basics to culture to advanced financial, tax, administrative, legal, and governance issues. Members also can purchase discounted access to a library of 60 prerecorded webinars, available 24/7, as well as other resources.

Sample webinar topics:

- Financing an ESOP Transaction
- Don't Do That with Your ESOP: Financial and Administrative Issues
- Succession Planning and Leadership Development
- Equity Compensation for LLCs

Read more at nceo.org/r/webinars and nceo.org/r/training

SEMINARS AND ANNUAL CONFERENCE

“I have nothing but positive things to share about my experience at NCEO events. For me, the networking experience is unmatched and the ideas that were shared were invaluable.” —Markita Madden-Puckett, ComSonics, Inc.

Members receive discounted access to our events. Our annual conference has sold out for several years, growing to over 1,400 attendees in 2015. We also hold several specialized seminars around the US every year. They not only bring you face-to-face with expert presenters but also provide opportunities to ask questions and network with others, learning from both presenters and peers.

Our seminars include:

- The ESOP Symposium: Ownership Solutions for Established ESOPs
- Get the Most Out of Your ESOP: An ESOP Communication and Culture Forum
- The S Corporation ESOP Seminar
- Is an ESOP Right for You? An In-Depth Look at Employee Stock Ownership Plans

Read more at nceo.org/r/meetings

Continuing Education — Our live webinars, seminars, and annual conference offer CPE, SHRM, and in some cases IRS and legal continuing education credit.

PUBLICATIONS

“The NCEO publishes some of the highest-quality, most user-friendly materials in the consulting business. I cannot recall any organization with such consistent quality, accuracy, and value to users.”

—Bob Buford, Robert D. Buford Executive Compensation Consulting LLC

Members receive our newsletter for members, the *Employee Ownership Report*, plus access to a searchable archive of newsletters back to 1997. Members also receive discounts on our more than 60 books and issue briefs, which provide detailed yet understandable guidance for company owners, managers, and advisors alike. Most publications are available in either print or PDF format.

Recent publications:

- *Sustainable ESOPs* (discusses how to remain an ESOP company for the long term)
- *The DOL Fiduciary Process Agreement for ESOP Transactions*
- *Staying Private: Liquidity Options for Entrepreneurial Companies*

Read more at nceo.org/r/publications

Read a sample newsletter at nceo.org/r/newsletter

OWNERSHIP CULTURE SURVEYS

“The NCEO survey is the best way Web Industries has found to benchmark our employee ownership culture against other ESOPs, identify opportunities for improvement, and drive the 10% year-over-year competitive advantage that research shows ESOPs + high engagement will deliver.”

—Michael Quarrey, Web Industries, Inc.

Our Ownership Culture Survey, available only to members, is an employee survey instrument designed exclusively for use by employee ownership companies. It measures the extent to which employees think and act like owners of their company and helps the company assess the strengths and weaknesses in its ownership culture.

Read more at nceo.org/r/survey

ADVICE AND SPEAKING

“We walked into our session with dozens of questions. We walked out with answers to every one.” —Lars Wulff, Co-CEO, Mud Bay

Members can call or email us at no cost for answers to questions about employee ownership, governance, and culture issues. On a limited basis, expert NCEO staff can provide paid consulting, and we often serve as guest speakers at company events and board meetings. Because we do not seek long-term contracts, we provide objective advice on how to proceed.

Read more at nceo.org/r/advice

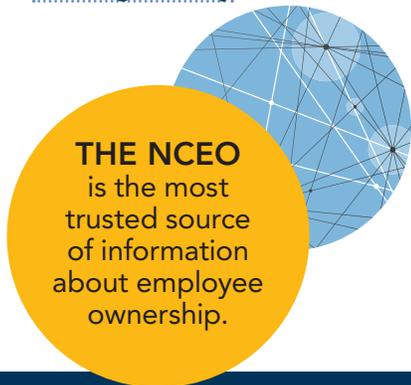
DATA ON ESOP COMPANIES

We compile comprehensive data on all ESOP companies, and our survey reports are one of the few sources available on their executive compensation and governance practices. Members receive access to downloadable research reports on these and other topics, and discounts on purchasing the full results.

Sample data resources:

- ESOP Executive Compensation Survey: full database and custom reports
- ESOP Corporate Governance Survey: full database and custom reports
- Database of US ESOP Plans
- List of Employee Ownership Plans in Major Public Companies

Read more at nceo.org/r/survey



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