



EMPLOYEE-OWNED S CORPORATIONS OF AMERICA

Dear Friend,

We appreciate your consideration of membership in ESCA.

Professional members are an integral part of ESCA's membership that, since 1998, has grown to more than 180 companies, and 220,000 employee-owners in every state in the nation. Members share our commitment to ensuring that no harm comes to S ESOPs as a result of intentional or unintended federal policy actions and supporting legislative initiatives to spur the creation of more employee-owned companies. Your participation is crucial to our long-term success.

The threat to this structure continues to be acute in a political and policy environment marked by political change, high budget deficits and growing federal debt, ambitious spending programs and the never-ending search for ways to raise new tax revenue by changing existing tax laws. To help ensure that the retirement benefits from the S ESOP structure are preserved, ESCA's singular purpose is to make sure that those who make political and policy decisions that could affect us know about S ESOPs and are committed to their future. It is a substantial task, but ESCA has achieved remarkable results in both preventing harm and building allies who support ***bipartisan legislation to encourage the creation of more S ESOPs, the Promotion and Expansion of Private Employee Ownership Act (S. 1300/H.R. 4141)***.

***ESCA's annual Leadership Summit will be held in Fort Lauderdale, FL from February 22-24, 2023. Registration will be available on our website, [www.esca.us](http://www.esca.us).*** The annual Summit draws over 200 senior executives of S corporation ESOPs and leading practitioners from around the country. Attendees will have the unique opportunity to hear firsthand how the policy agenda and politics of the 118<sup>th</sup> Congress could impact your S ESOP business. Summit events including hearing from members of Congress playing key roles in the federal tax policymaking process, peer-to-peer breakout sessions on topics relating to S corporation ESOPs, and a political update regarding the political landscape for 2023.

Please call Diandra at (202) 629-5821 or Bob at (585) 295-2466 if we can answer any questions you have, or if you would like to speak to another ESCA professional member for their perspective on the benefits of being part of this important group. We look forward to working with you.

Best Regards,

A handwritten signature in blue ink, appearing to read 'Bob Petrone'.

Bob Petrone  
Chairman, ESCA Membership Committee  
Chief Financial Officer, Lewis Tree Service  
West Henrietta, NY

A handwritten signature in blue ink, appearing to read 'Diandra Brennan'.

Diandra Brennan  
Director of Membership  
ESCA



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## ESCA PROFESSIONAL MEMBERSHIP APPLICATION FORM

Company  
Name:

Date:

Website address:

### CONTACT INFORMATION

Name:

Title:

Address:

City:

State:

ZIP Code:

Phone:

Fax:

Mobile:

E-mail:

### BUSINESS INFORMATION/ESOP EXPERIENCE

### WHICH ESCA MEMBER COMPANIES DO YOU CURRENTLY WORK WITH?

### HOW DID YOU LEARN ABOUT ESCA?

Please e-mail completed form to Diandra Brennan at [diandra@esca.us](mailto:diandra@esca.us)

Employee-owned S Corporations of America  
1341 G Street NW, 6<sup>th</sup> Floor  
Washington, DC 20005  
Phone: 202-629-5821  
[www.esca.us](http://www.esca.us)

Once your membership form is received and it is determined you meet the membership criteria, you will be invoiced for your membership according to the current dues structure.



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## 2023 ESCA Membership Rates

### 2023 Professional Membership

#### **General Professional Membership**

Practitioners in the S corporation and ESOP fields are eligible to join ESCA as professional members. Though professional members may not sit on the Board of Directors, they are invited to the semi-annual ESCA meetings. In addition, professional members receive all updates, information and materials provided to the general membership and are eligible to serve on ESCA's Advisory Committee. Eligible practitioners approved by the ESCA Board of Directors Membership Committee pay dues of \$2,500 in 2023.

#### **Advisory Committee Membership**

Up to 20 of ESCA's Professional Members are invited on an annual basis by the ESCA Board of Directors to serve on ESCA's Advisory Committee. Appointment to the Advisory Committee is based upon the Professional Member's commitment to ESCA's goals of promoting and preserving the S-ESOP structure as evidenced by maintaining a high level of professionalism and integrity, assisting ESCA in securing new members and providing counsel and insights to the ESCA Board of Directors on issues affecting S corporation ESOPs. The Advisory Committee meets at ESCA's semi-annual meetings. No additional dues are paid by Professional Members appointed to the Advisory Committee.