



# It's a New Year...

## What's Happening in Your Local Chapter?

The "What's What" of the latest and greatest in the New York/New Jersey Chapter with The ESOP Association.

### Not a Member Yet?

Contact Ivy Wan-Beltejar at  
iwan-beltejar@empireval.com.



## Meet Your Chapter Representatives

Interested in volunteering for the Chapter? Contact Kale Tissue for more information.



*Kale Tissue*

Chapter Director

The ESOP Association



*Matthew Sharpe*

Chapter President

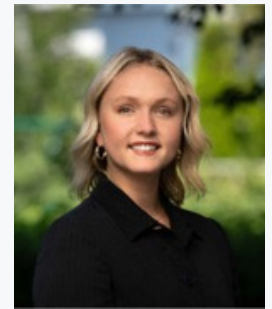
President  
Alltek Energy Systems Inc.



*Ivy Wan-Beltejar*

Vice President, Membership

Director  
Empire Valuation  
Consultants LLC



*Serena Amlie*

Vice President,  
Programming

ESOP Client Advisor  
Spinnaker Trust



*Rob Hilton*

Vice President, Advocacy

Managing Director  
South Park Advisors, LLC



*Kayse Diamond*

Vice President,  
Communications

Senior Manager of Business  
Process Optimization  
ProAct, Inc.



*Danielle Rice*

Vice President,  
Communications

Regional Sales Director  
ProAct, Inc.



*Larry Filipski*

Vice President,  
Fundraising/Sponsorship

Board Member  
Nordon, Inc.

# The Launch of ESOP Roundtables

Instead of our usual Spring conference, the Chapter has decided to introduce a series of regional roundtable events. We believe that these gatherings will foster deeper connections, enhance learning, and promote engagement by keeping them closer to home and encouraging stronger ties within the community.



## The First of the Series Rochester, NY

What an incredible kickoff to our first Let's Talk ESOPs event! We gathered in Rochester, NY on February 27th for a day of connection, learning, and shared ownership energy.

- Lively roundtables covering C-Suite, Valuation/Finance, and Communications/Culture sparked helpful conversations and real takeaways
- A behind-the-scenes tour of Butler/Till's space
- Thoughtful insights from Butler/Till's CFO on their ESOP journey and the power of ownership
- A warm sense of community across the NY ESOP network

A big thank-you to Butler/Till for hosting and to everyone who helped make this first event shine!

Missed the first one? There will be more! Follow us on [LinkedIn](#) for details.

**Interested in  
hosting our next  
Roundtable?**



We're looking for ESOP companies to host.

Contact Serena at [samlie@spinnakertrust.com](mailto:samlie@spinnakertrust.com) if your company would be interested and we'll do the rest!

## Other Upcoming Events:

- National Conference in Washington D.C  
May 5-8, 2026
- ESOP Roundtable in NYC (Grand Central Oyster Bar & Restaurant)  
May 28, 2026
- CFO Summit in Sonoma, CA  
June 28-30, 2026
- CEO Summit in Rancho Palos Verdes, CA  
August 23-25, 2026
- Northeast Regional Conference in Groton, CT (Mystic Marriot)  
October 7-9, 2026
- Employee Owned in Las Vegas, NV  
November 1-4, 2026

For more information visit:

[The ESOP Association](#)



## Are You Taking Advantage of Your TEA Member Benefits?



Member Benefits  
Chart



Events and Education



Save Money and  
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ESOP Policy and  
Advocacy



ESOP Rewards

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THE  
**OWNERSHIP  
EFFECT**  
WITH JIM BONHAM

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*...And don't forget to follow us on LinkedIn!*

