

Ownership Matters

Wisconsin Chapter Quarterly Newsletter



ESOP Valuation Safe Harbor Nears Reality

The Retire Through Ownership Act has cleared both the Senate and House with overwhelming bipartisan support and is awaiting the President's signature. The legislation establishes a valuation safe harbor for ESOP trustees, allowing them to rely on independent appraisals from qualified valuation firms using established IRS guidelines. The measure is expected to reduce transaction risk, provide greater certainty in ESOP valuations, and help more business owners confidently transition ownership to employees.



Wisconsin Company Showcase

The Wisconsin Chapter of The ESOP Association had the privilege of bringing employee-owned companies together for a company showcase at **Weinbrenner Shoe Co Inc.** The day was filled with breakout sessions and peer discussions, attendees shared ideas on leadership development, ownership culture, and ESOP best practices. *See the LinkedIn post*

Upcoming Events



*Link to register for the
Free Mini-Series*



Share how your company celebrates
on LinkedIn and use the hashtag
#EOmonth26



*November 1-4
Las Vegas, NV
Registration Link*

Midwest Conference Recap

The 2026 Midwest Regional Conference was hosted by the Iowa/Nebraska Chapter, and it opened with a keynote speech by Jann Freed, Ph. D., who assisted the attendees in adopting an ownership mindset and in considering the legacy of employee ownership.

The conference also raised the profile of ESOPATHON by having the various Chapters compete to raise funds. Although the Wisconsin Chapter didn't win, they still made a difference. In fact, our own Chapter President, Dave Elliott, earned a pie to be thrown in his face as a result of the friendly competition.

Thanks to the Iowa/Nebraska Chapter for putting on a memorable event!



Helpful Links to support & stay informed on the Wisconsin Chapter



[The WI Chapter podcast is available on YouTube.](#)
Please subscribe and share with others!



[ESOPATHON has officially kicked off.](#) Create a team and support the [Employee Ownership Foundation \(EOF\)](#).



[Check out our website for upcoming events and membership options](#)



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