

**COVER SHEET FOR AMENDMENT OF
POST-TRAVEL SUBMISSION**

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Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the **Office of Public Records** in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Joshua L. Sheinkman

Employing Office/Committee: Committee on Finance

Travel Expenses Paid by (List all sources): Employee Ownership Foundation, Center on Business and Poverty

Travel Date(s): 09/05-10/2022

Description/Title of Attached Forms: Oxford Symposium on Employee Ownership. See Attachment A

Purpose of Amendment (describe the reason for amending original submission):

Updating the post-travel disclosure with the final version of trip documents

10/10/2023

(Date)

Joshua L. Sheinkman

(Signature of Traveler)

ATTACHMENT "A – TRIP DESCRIPTION"

The Oxford Symposium on Employee Ownership is a gathering of leaders, stakeholders, and decision makers in the international employee ownership community. This annual gathering explores major issues and obstacles to participatory capitalism and employee ownership. The 2022 symposium is focused on exploring financial barriers to the formation of Employee Stock Ownership Plans and analogous shared equity arrangements, which are growing and receiving renewed interest in countries around the world including the United States and The United Kingdom.

Held in the historic Sheldonian Theatre at Oxford University, the Symposium is a collegial, participatory gathering of thought leaders, stakeholders, practitioners and government officials that explores and surfaces major issues and obstacles to participatory capitalism and employee ownership. The event is held "in the round" where presenters share their insights and experiences to an audience of participants who in return provide discussion, rebuttal, and augmentation for consideration.

Presenters, panelists, and participants will include current and former government officials, academics with background in employee ownership and equity share arrangements, practitioners in the areas of law and plan administration, and leaders of non-profit organizations operating in the space in both the UK and the Americas.

After first arriving in London, event participants will spend a day in London in briefings by experts and practitioners in the UK system of employee equity share arrangements as well as with current elected and appointed government officials in Parliament and Her Majesty's Revenue and Customs Department. Participants will then travel to Oxford where the Symposium proper will be held for two days. Participants will then return to London for return air travel to the United States.

Schedule Overview

Monday, Sept. 5	Travel from U.S. to London
Tuesday, Sept. 6	Morning Briefings regarding UK and EU forms of Employee Ownership Afternoon meetings with government officials Late afternoon train travel to Oxford
Wednesday, Sept. 7	Day 1 Symposium
Thursday, Sept. 8	Day 2 Symposium
Friday, Sept. 9	Return travel to London; U.S.



Joshua Sheinkman
Senate Finance Committee
219 Dirksen Senate Office Building
Washington, DC 20510

Dear Joshua,

I am writing you today on behalf of the Employee Ownership Foundation and the Center on Business and Poverty to formally invite you to attend the **Oxford Symposium on Employee Ownership September 5-9, 2022**.

This annual event is a gathering of the leaders, stakeholders, and decision makers in the international employee ownership movement where participants learn about and discuss major issues and obstacles to participatory capitalism and employee ownership. This year's symposium is focused on exploring financial barriers to the formation of Employee Stock Ownership Plans and analogous shared equity arrangements, which are growing and receiving renewed interest in countries around the world including the United States and The United Kingdom. It will be held September 7 and 8 at the historic Sheldonian Theatre in Oxford, and prior to the symposium, we will be arranging a day of policy briefings and conversation with government officials in London.

Please find attached the requisite Private Sponsored Travel Disclosure Forms that have been filed with the Senate ethics committee. With the required ethics approvals, your travel expenses would be sponsored by the Employee Ownership Foundation as described in these documents, including transportation, lodging, and meals. In order to meet the required 30 day cut-off period prior to travel as required by the Senate rules, you must file your travel materials no later than August 4.

We are anticipating participants and attendees from the United States, the U.K., Denmark, Japan, South Africa, Canada, Italy, India and several other nations. For further information about the symposium, please look here: <http://eosymposium.org/>

Should you have any questions, or require any further information, please feel free to reach us at 202-293-2971.

I truly hope you will be able to join us for this important symposium and discussion at Oxford in September.

With warm regards,

A handwritten signature in black ink, appearing to read "James J. Bonham".

James J. Bonham
President, Employee Ownership Foundation

A handwritten signature in black ink, appearing to read "John Hoffmire".

John Hoffmire
Center on Business and Poverty