

RE-2 Employee Post Travel Disclosure of Travel Expenses

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 144 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**



Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):

Employee Ownership Foundation

Travel Dates:

(8/3/25 - 8/8/25)

Name of accompanying family member (if any):

N/A

Relationship to Traveler:

N/A

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$2,929.94	\$684.91	\$450	\$22.30 (United Kingdom Electronic Travel Authorization)

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

9/4/25 Jared Sackett

Date

Printed Name of Traveler

Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

09/04/2025

Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☒ Yes ☐ No

Expense Change	Revised Amount	Explanation
\$50	\$76.95	Lyft to IAD; exceeded \$50 allotment
\$2,200	\$2,492.11	Flight from IAD to Heathrow; exceeded \$2,200 allotment
\$75	\$150.45	Taxi from Heathrow to London; exceeded \$75 allotment
\$250	\$309.91	Early check-in fee at Hilton London Tower Bridge; I was charged an additional \$59.91, which exceeded the \$250 allotment (NOTE: I did not pay for the hotel reservation itself)
\$75	\$84.48	Uber from London to Heathrow; exceeded \$75 allotment
\$50	\$75.95	Lyft from IAD; exceeded \$50 allotment

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

Were there any additional changes to the pre-approved trip?

☒ Yes ☐ No

Explanation:

The fee for the United Kingdom's Electronic Travel Authorization (ETA) was not included in the pre-approved travel expenses. It cost \$22.30 & I paid for it personally.

During this privately-sponsored travel, I personally booked and paid for my flight from D.C. to London. I was also responsible for paying for the Lyfts, Uber, and taxi rides that I took during the trip. Finally, I paid for the \$59.91 early check-in fee at the Hilton London Tower Bridge on 8/4/25.

In total, the total expense of my trip was \$4,087.15.

Of that, I personally need to be reimbursed \$2,980.15.

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved.

Name of Traveler:
Jared Sackett

Employing Office/Committee:
MARSHALL, ROGER

Private Sponsor(s):
Employee Ownership Foundation

Destination(s):
London, United Kingdom Oxford, United Kingdom

Travel Dates:
08/03/2025 to 08/09/2025

NOTE: If you plan to extend the trip for any reason you **must** notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

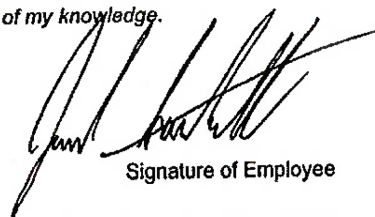
I handle employee ownership and retirement issues for Senator Roger Marshall, who is the Chairman of the HELP Subcommittee that has jurisdiction over the Employee Benefits Security Administration (EBSA) and the Employee Retirement Income Security Act (ERISA). I look forward to learning more about the employee ownership business model, barriers facing employee ownership, and opportunities ahead. I hope to develop a holistic understanding of ESOPs and how they can lead to economic freedom and mobility.

Do you have an accompanying family member or spouse on this trip?
No

Name and Relationship to Traveler:
N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

7/22/2025
Date


Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER
(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)


(Print Senator's/Officer's Name)

hereby authorize

JARED SACKETT
(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☒ (signify "yes" by checking box)

7/23/2025
Date


Signature of Supervising Senator/Officer



Jared Sackett
Senator Roger Marshall
Russell Senate Office Building Suite 479A
Washington, DC 20002

Dear Jared,

I am writing you today on behalf of the Employee Ownership Foundation to formally invite you to attend the **Oxford Symposium on Employee Ownership**. The official program would begin at 6:00 pm on Monday, August 3, 2025 and conclude after the closing dinner on Thursday, August 7, 2025. Due to the time zone differences and predominate flight schedules between Washington, DC and London, UK, this would likely require your departure on the overnight outbound flights on Sunday, August 2 in order to arrive in time to participate in the Monday program and your return from London back to Washington on mid-day flights on Friday August 8.

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. The first portion of the symposium is held in London on Monday August 3 and Tuesday August 4 in order to accommodate government officials and presenters stationed in London. Participants are then transported via motorcoach to Oxford on Tuesday evening for the balance of the symposium at Oxford University.

Please find attached the event and subject matter schedules that you will need to provide to the Senate ethics committee along with your specific air travel arrangements. Because we do not know your particular departure or return preferences (any of the Washington, DC area airports, airlines, availability or preferences, etc.,) and because we would prefer to not manage any sensitive or personal information such as passport numbers, we would ask that you make your own air travel decisions and submit those receipts to us for reimbursement. With the required ethics approvals, your travel expenses would be sponsored by the Employee Ownership Foundation as described in the materials I have provided to the ethics committee including transportation, lodging, and meals. In order to meet the required 30 day cut-off period prior to travel as required by the House rules, you must file your travel materials no later than July 3, 2025 .

We are anticipating more than 130 participants and attendees from more than 27 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 August.

With warm regards,

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

James J. Bonham
President, Employee Ownership Foundation

Employee Ownership Foundation: 2025 Oxford Symposium on Employee Ownership

 Jared Sackett

Title:
Legislative Assistant

Employing Office/Committee:
MARSHALL, ROGER

Duty Station:
WASHINGTON, DC

Destination(s):
London, United Kingdom
Oxford, United Kingdom

Explain how this trip is specifically connected to the traveler's official or representational duties:

I handle employee ownership and retirement issues for Senator Roger Marshall, who is the Chairman of the HELP Subcommittee that has jurisdiction over the Employee Benefits Security Administration (EBSA) and the Employee Retirement Income Security Act (ERISA). I look forward to learning more about the employee ownership business model, barriers facing employee ownership, and opportunities ahead. I hope to develop a holistic understanding of ESOPs and how they can lead to economic freedom and mobility.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Employee Ownership Foundation

§501(c)(3) Organization Type
Private Foundation

Address 2 (Optional)
Suite 410

Phone Number
2022932971

Is your organization classified as a §501(c)(3)?

☒ Yes ☐ No

Address
200 Massachusetts Ave., NW

City, State Zip
Washington, District Of Columbia 20001 United States

Organization URL

History of Congressional Travel

The Employee Ownership Foundation sponsored travel to the 2022, 2023, and 2024 Oxford Symposium on Employee Ownership.

Educational Activities

The Employee Ownership Foundation (EOF) has a three-decade long history of funding academic, government, and practitioner gatherings and exploration related to employee ownership and the expansion of employee ownership. Among others, the EOF has provided funding for academic seminars and programs at Rutgers University, The University of Virginia, Pepperdine University, Kent State University, and California State University San Diego. The EOF organizes and funds an annual executive education program at the University of Virginia Darden School of Business. The EOF also funds various academic fellowships and other direct research grants on an annual basis. Finally, the EOF engages in public communications and education about employee ownership and the economic and community benefit provided by this model of business ownership.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

☒ I certify that the sponsor is not a foreign government.

- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

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 2025 symposium is focused on exploring methods of expanding involvement in employee ownership with non-governmental entities, ongoing regulatory obstacles to employee ownership under different governments, and emerging threats. 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 more than 27 nations.

Explain how the purpose of the trip relates to your organization's mission.

The Employee Ownership Foundation's mission is to grow awareness of and increase the number of employee owned businesses, including Employee Stock Ownership Plans and Employee Ownership Trusts. The Oxford Symposium on Employee Ownership is designed to convene thought global leaders, practitioners, and policymakers to engage in international idea exchange focused on reducing barriers and improving access to employee equity share arrangements in business. By providing funding to allow Senate staff with interest or responsibility for employee ownership or employee equity plans to

Is your organization the only sponsor for this trip?

- ☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip

- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

i Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
08/03/2025 @ 06:00 PM



Trip End Date/Time:
08/08/2025 @ 10:00 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

- ☐ Yes
- ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$2,500.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Airfare	Coach	\$2,200.00
Note Round-trip premium coach airfare from a Washington, DC (WAS) area airport to London (either Heathrow or Gatwick). Specific time and airports to be selected by the traveler.		
Ground Transportation	N/A	\$100.00
Note Taxi to departing flight and return home after return flight.		
Ground Transportation	N/A	\$75.00
Note Taxi from London airport to Hilton London Tower Bridge.		

Transportation Type	Class	Amount
Ground Transportation	Coach	\$50.00
Note Coach transport from London to Oxford, UK.		
Ground Transportation	N/A	\$75.00
Note Taxi from Oxford to departing airport.		

Lodging (Per Member/Officer/Employee: \$625.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
08/04/2025	08/05/2025	Hilton London Tower Bridge	London	None	United Kingdom	1	\$250.00	No
08/05/2025	08/08/2025	Oxford University Housing	Oxford	None	United Kingdom	3	\$125.00	No

Meals (Per Member/Officer/Employee: \$450.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
08/04/2025	\$0.00	\$0.00	\$75.00	\$0.00	\$75.00	London	None	United Kingdom	No
08/05/2025	\$0.00	\$25.00	\$50.00	\$0.00	\$75.00	London/Oxford	None	United Kingdom	No
08/06/2025	\$0.00	\$50.00	\$75.00	\$0.00	\$125.00	Oxford	None	United Kingdom	No
08/07/2025	\$0.00	\$50.00	\$75.00	\$0.00	\$125.00	Oxford	None	United Kingdom	No
08/08/2025	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00	Oxford	None	United Kingdom	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$0.00)

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments

Document Name
There are no additional attachments.

2025 Oxford Symposium on Employee Ownership

Michael Sinacore	Senate HELP Committee	Pensions Policy Director	Michael_Sinacore@help.senate.gov
Sarah Mysiewicz	Senate HELP Committee	Senior Counsel	Sarah_Mysiewicz@help.senate.gov
Vanessa Aguillar	Sen. Bernie Sanders	Legislative Aide	Vanessa_Aguilar@sanders.senate.gov
Isaac Batt	Sen. Bill Cassidy	Counsel	Isaac_Batt@cassidy.senate.gov
Dan Chasen	Senate HELP Committee	Labor Policy Advisor	Daniel_Chasen@help.senate.gov
Jared Sackett	Sen. Roger Marshall	Legislative Aide	Jared_Sackett@marshall.senate.gov
Meghan McCully	Sen. Tim Scott	Legislative Assistant	Meghan_McCully@scott.senate.gov
Paul LaPointe	Sen. Tim Kaine	Legislative Assistant	Paul_Lapointe@kaine.senate.gov
Peter Barrett	Sen. Markwayne Mullin	Special Projects Advisor	peter_barrett@mullin.senate.gov
Kimberly Arndt	Senate Finance Committee	Senior Tax Counsel	Kim_arndt@finance.senate.gov
Ben Thomas	Sen. Tammy Baldwin	Legislative Aide	ben_thomas@baldwin.senate.gov

Day	Start	End	Location	Session Title	Session Topic/Description	Speakers
02 August 2025						
	19:25	7:45 (+1)	Washington, DC (IAD) to London Heathrow	Isaac Batt Travel	Flight Washington Dulles to London Heathrow	N/A
03 August 2025						
	7:45	9:45		Isaac Batt Arrival Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A
	17:50:00	6:20 (+1)	Washington, DC (IAD) to London Heathrow	Kimberly Arndt Travel	Flight Washington Dulles to London Heathrow	N/A
	17:50:00	6:20 (+1)	Washington, DC (IAD) to London Heathrow	Jared Sackett Travel	Flight Washington Dulles to London Heathrow	N/A
	21:35:00	9:50 (+1)	Washington, DC (BWI) to London Heathrow	Daniel Chasen Travel	Flight Baltimore/Washington to London Heathrow	N/A
	22:20	10:40 (+1)	Washington, DC (IAD) to London Heathrow	Vanessa Aguiar Travel	Flight Washington Dulles to London Heathrow	N/A
	22:20	10:40 (+1)	Washington, DC (IAD) to London Heathrow	Sarah Mysiewicz Travel	Flight Washington Dulles to London Heathrow	N/A
04 August 2025						
	6:20	10:00	London	Kimberly Arndt Arrival and Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A
	6:20	10:00	London	Jared Sackett Arrival and Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A
	9:50	11:50	London	Daniel Chasen Arrival and Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A
	10:40	1:00 PM	London	Vanessa Aguiar Arrival and Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A

	10:40	1:00 PM	London	Sarah Mysiewicz Arrival and Ground Transport to Hotel	Attendees traveling from Washington arrive on overnight from WAS and arrange own ground transport from airport to hotel	N/A
	16:00			Michael Sinacore Arrival at Hotel	Michael Sinacore is arriving on his own accord from other unrelated travel.	N/A
	18:00	20:00	Hilton London Tower Bridge, 5 Moore London Pl, Tooley St., London SE1 2BY	Welcome Dinner	National Delegations hold welcome dinners to review program, participants, topics and initiate discussion.	
Tuesday 05 August 2025						
Tues	8:30	9:00	CMS Law Firm, 78 Cannon Street, London	Registration & Coffee		
Tues	9:00	9:30		Welcome and Introduction Session	The Symposium begins with our working Welcome Session , designed to set the rules, tone and substantive foundation for a day of meaningful dialogue and thought leadership.	Jaspal Pachu , Partner, CMS James Bonham , President The Employee Ownership Foundation
Tues	9:30	10:25		Three Models	Discussion of the basics of employee ownership through an introduction to ESOPs (Employee Stock Ownership Plans), Stock Option Plans, and three evolving approaches to EOTs (Employee Ownership Trusts) the UK model, the Slovenian Model, and the Canadian model. This session will break down these concepts into simple terms, explaining how they work, the differences between collective ownership through Non-Individual Account EOTs and personal stakes through Individual Account EOTs, and how ESOPs and Stock Option Plans fit into the picture. This panel will address the types of employee ownership plans discussed from the perspective of saying what problems or objectives each plan is meant to solve or address.	Tony Loffreda , Senator (Quebec), Parliament of Canada Graeme Nuttall , Partner, Employee Ownership Association (Moderator) David Binns , Special Projects Consultant, ESOP Services, Inc. Tej Gonza , Institute for Economic Democratization (IED)
Tues	10:25	10:35		Break		

Tues	10:35	11:30		Four Stories of How Firms Used Employee Ownership	This session will study four remarkable founder stories with successful employee ownership experiences, most told by practitioners and today's managers of the companies. Participants will explore the motivations that drove these transactions, the challenges faced, and the outcomes achieved. This inspiring set of case studies highlight the real-world impact of employee ownership and some of the challenges faced by their founders.	Tiara Letourneau , Director, Rewrite Capital Michael Quarrey , Vice President, Web Industries, Inc. Husayn Kassal , CEO & Founder, Quench.ai Barry Horner , Executive Chair, Paradigm Norton Financial Planning
Tues	11:30	11:35		Break		
Tues	11:35	12:30		Four Sets of Details	A deeper dive into how the case study companies used particular laws to meet the objectives of founders, employees, and the societies they existed within. This panel will be presented from the perspective of four professional services providers who understand employee ownership practice and the impact it has on each of the stakeholders involved in transactions.	Jon Shell , Chair, Social Capital Partners / Align3 Capital Partners John Hoffmire , Director, Centre for Mutual and Co-owned Business, University of Oxford Jaspal Pachu , Partner, CMS Ann Tyler , Chair, Ownership at Work
Tues	12:30	13:35		Lunch with Keynote Speaker	The Importance and Role of Government Support of Employee Ownership	Rt Hon Sir Vince Cable , Former Leader of the Liberal Democrats and State Secretary for Business, Innovation and Skills
Tues	13:35	13:45		Break		
Tues	13:45	14:40		Valuation, Regulation and Precedent	Participants will learn about the critical factors that drive employee ownership in this comprehensive session focused on the interplay between regulatory requirements, plan design, plan administration, and different models of EO. Gain a clear understanding of the financial, legal, and strategic elements that underpin effective ownership models. Particular focus will be given to valuation and the laws and regulations that lead to fair appraisals of companies.	Ted Becker , Partner, McDermott Will & Emery (Moderator) Miguel Paredes , President, Prudent Fiduciary Services Jade Palermo , Senior Manager, Empire Valuation Barbara Clough , Managing Director, Blue Ridge ESOP Associates
Tues	14:40	15:00		Break & Group Photo		
Tues	15:00	15:30		Board Buses to Oxford	Participants will board coaches for transport to Oxford University	
Tues	15:30	17:30		Buses Transport to Oxford	Participants will be transported via motorcoach from London to Oxford.	

	17:30	18:30	St. Hilda's College and Lincoln College, Oxford University, Oxford, UK	Lodging Check-in		
Tues	19:00			Small Group Dinners	Small group dinners of conference delegations	
Wednesday: 06 August 2025						
Wed	7:30	8:30		Breakfast at Colleges		
Wed	8:30	9:00	Examination Schools, University of Oxford, 75-81 High Street, Oxford	Registration & Coffee		
Wed	9:00	9:15		Welcome/Opening Session	Janet Cooper OBE, leading authority in the field of employee ownership and a long-standing advocate for broad-based equity participation, will set the tone for the day with a brief welcome to attendees, acknowledging the significance of the symposium's setting at the University of Oxford, the growing momentum around employee ownership globally, and the relevance of this gathering as a forum for both critical reflection and collaborative idea formation.	Janet Cooper, OBE, Non-Executive Director and Board Advisor
Wed	9:15	9:30		Setting the Context	This session will outline the objectives and goals of the symposium, providing delegates with a clear understanding of what to expect throughout the event. Key topics, session formats, and opportunities for engagement will be highlighted, ensuring participants are well-prepared to make the most of their time.	James Bonham, President The Employee Ownership Foundation
Wed	9:30	10:25		Developments in EU & UK	In this session, we will explore the latest developments in employee ownership across the European Union and the UK, with a focus on Slovenia and the UK—two regions showcasing distinct and innovative approaches. Panelists will explore	Katja Bozic, State Secretary, Ministry of Finance, Slovenia Graeme Nuttall, Partner, Employee Ownership Association Tej Gonza, Institute for Economic Democratization (IED)
Wed	10:25	10:35		Break		

Wed	10:35	11:30		Two Countries: One New One Old	Laws and regulations around employee ownership are in a continuous state of development and improvement. As one of the most recently adopted models, Canada faces a quick timeline for marketplace adoption before re-authorization of the program. As one of the oldest models, the U.S. ESOP is experiencing a massive amount of new regulatory and legislative initiatives to catalyze growth and expansion. Participants will explore the interface between advocacy organizations, research, and government decisionmakers during each phase of employee ownership legal and regulatory maturity.	(Moderator) James Bonham , President The Employee Ownership Foundation Peter Ney , Vice Chair, EA Engineering Jon Shell , Chair, Social Capital Partners / Align3 Capital Partners
	11:30	11:35		Break		
CONCURRENT SESSIONS - Participants may choose their own topic and session in which to participate.						
Wed	11:35	12:30		Academicians and Researchers - What Can We Do That Really Matters?	Join academicians and researchers and explore how academic inquiry and research can drive meaningful impact in the field of employee ownership. As thought leaders, scholars play a crucial role in shaping policy and influencing business practices.	(Moderator) Andrew Pendleton , Prof of Employee Ownership and Reward, Employee Ownership Australia Roy Mitchell , Principal Economist, Department for the Economy John Hoffmire , Director, Centre for Mutual and Co-owned Business, University of Oxford Erik Olsen , Associate Professor and the Department Chair in Economics, University of Missouri Kansas City Kyoung Yong Kim , Associate Professor, Villanova University Andrea Armeni , Associate Professor, NYU Wagner Graduate School of Public Service

Wed	11:35	12:30		Employee Ownership Organizations	Engage in conversation with leaders of employee owned organizations around the world as they share their experiences and insights on navigating change in an ever-evolving business landscape.	(Moderator) James Bonham , President The Employee Ownership Foundation Tej Gonza , Founder, Institute for Economic Democracy Pascale Nieuwland-Jansen , Director, SNPI (Netherlands Participation Institute) Olivia Hansen , Consultant, Danish Business Authorities Karen Maguire , Chairperson, Employee Ownership Ireland (EOI) James de le Vingne , CEO, EOA
Wed	11:35	12:30		Government Leaders	Government leaders from around the world will share their insights and strategies on how they are fostering and supporting employee ownership as a pathway to economic stability, innovation, wealth distribution, and business succession.	Tony Loffreda , Senator (Quebec), Parliament of Canada Sharon Bowles , Parliamentary Office, House of Lords Igor Feketija , State Secretary at the Ministry for Labour, Ministry of Labour, Slovenia Anneliese Dodds , MP, Parliament of UK
Wed	11:35	12:30		How Wealth is Being Created in These US ESOP Transactions	Explore how ESOPs are driving wealth creation for employees, business owners, and organizations. This session highlights the tax advantages, financial growth, and cultural benefits of ESOPs, using real-world examples of successful transactions	(moderator) Regina Carls-JP Morgan Ali Jamshidi , CFO, CTL Engineering Ian MacFarland , CEO, EA Engineering Becky Streff , Chief People Officer, Holden Industries

Wed	11:35	12:30		Impact Investing & Employee Ownership	Join us for an interactive session about how impact investors are increasingly seeking to align financial returns with positive social outcomes and employee ownership models are emerging as a key vehicle for achieving both. Share insights, ask questions, and learn from the experiences of others in the field	Michael Brownrigg , Co-Founder and Partner, Apis & Heritage Capital Jean-Philippe Debas , Equilis Capital
Wed	11:35	12:30		Regulators	This session will examine the crucial role that regulators play in shaping and supporting employee ownership models. From providing the legal frameworks that enable employee ownership to influencing tax incentives and policy reforms, regulators are instrumental in determining how businesses transition to and sustain employee ownership structures.	Leonardo Kellaway , HM Treasury Joe Phillips , CS&TD Business Assets & International, HM Revenue & Customs James Coward , CS&TD Business Assets & International, HM Revenue & Customs James Shuttleworth , Policy Advisor, Trusts, & CGT, HM Revenue & Customs Sam Couldrick , HM Treasury Stephen Holland , HMRC EOT Tax Compliance Lead
Wed	12:30	13:35		Keynote Address	Join the Prime Minister of Slovenia for an engaging discussion around the ideation, development, drafting, and adoption of the new Slovenian model of Employee Ownership Trust (EOT).	Prime Minister Robert Golob , Slovenia
Wed	13:35	13:45		Break		
CONCURRENT SESSIONS - Participants may choose their own topic and session in which to participate.						
Wed	13:45	14:40		Complicated Legal Situations	This session focuses on the complicated legal issues that can arise in the realm of employee ownership, and effective strategies that can be used to avoid or prepare for these challenges.	Lestlie Lauer , (Moderator) Managing Director, RBC Wealth Management Ewan Hall , Director / Partner, Baxendale Employee Ownership Limited Jim Steiker , Chairman, SES ESOP Strategies

Wed	14:50	15:35		Models for Funding Deals	Learn the essential steps and strategies involved with seller financing and receiving outside financing. Emphasis will be placed on securing outside funding, the capital stack, and successfully navigating the complexities of working with banks to finance employee ownership deals.	David Craddock , CEO, David Craddock Consultancy Services Leah Turnbull , Managing Director and National ESOP Practice Lead, BMO
Wed	15:35	16:20		Developing Employee Ownership Where the Majority of People Live and Work	This session will focus on strategies for expanding employee ownership in the places where the majority of people live and work—in countries where employees do not own or control an overwhelming number of shares. Discuss how employee ownership may grow in nations where tax advantages might not be a main driver of the growth of the movement.	Delilah Rothenberg , Co-founder & Executive Director, Predistribution Initiative Smita Mankad , Board Member, Mahindra Companies Shaun Smit , Director, Transcend Capital Sam Boustred , Global Members' Board Chair, Scott Bader Katrina Mafardzhe , Tax Manager, Deloitte
Wed	16:20	16:35		Break		
Wed	16:35	17:20		Alternative Forms of Ownership	This session will examine a variety of alternative ownership models beyond the traditional frameworks. Delegates will gain a deeper understanding of innovative approaches where profit-sharing is used, small company ownership is encouraged, and even consumers can become owners in hybrid situations.	Robert Postlethwaite , Founder & Managing Director, Postlethwaite Alan Coleman , CEO, Wolfgang Digital Jens Lowitzsch , Project Director, Freie Universität Berlin, Institute for Eastern European Studies
Wed	17:20	18:15		Break		
Wed	18:15	18:55		Reception		
Wed	18:55	20:55		Keynote and Dinner	Invited Dinner Speaker To be Announced	
Thursday 07 August 2025						
Thu	7:30	8:30		Breakfast at Colleges		
Thu	8:30	9:00		Networking & Coffee		

Thu	9:00	9:30	Examination Schools, University of Oxford, 75- 81 High Street, Oxford	Welcome & Review Day 2	Start the second day of the symposium with a warm welcome and a thoughtful review of Day One. This session will recap the key insights, discussions, and takeaways from the previous day's sessions, highlighting the most impactful moments and themes.	James Bonham , President The Employee Ownership Foundation
Thu	9:30	10:25		Governance & Employee Ownership	Examine governance within employee ownership structures and explore how effective governance can enhance decision-making, foster employee engagement, and ensure the long-term sustainability of employee-owned organizations. This session will highlight the key benefits of well-structured governance models, while also addressing the challenges faced by cooperatives, demonstrating why they often struggle to achieve the same level of success and stability as other employee ownership models.	Ian MacFarland , CEO, EA Engineering Jon Shell , Chair, Social Capital Partners / Align3 Capital Partners Beatriz Gonzalez , President (ASLE) General Manager (BETSAIDE), ASLEBetsaide Rodrigo Zuloaga , Centro De Capital Incluyente
Thu	10:25	11:35		Break		
CONCURRENT SESSIONS - Participants may choose their own topic and session in which to participate (repeated sessions from prior day).						
Thu	11:35	12:30		Academicians and Researchers - What Can We Do That Really Matters?	This interactive session invites academicians, researchers, and thought leaders to explore how academic inquiry can drive meaningful impact in the field of employee ownership. By discussing the role of research in shaping policy, influencing business practices, and advancing the employee ownership movement, participants will work together to identify actionable insights and strategies for creating real-world change.	(moderator) Campbell McDonald , Chief Executive, Ownership at Work Thomas Steger , Professor, University of Regensburg / German Federal Association of Employee Ownership (AGP) Sean Geobey , Associate Professor, University of Waterloo Pushkar Jha , University of East London
Thu	11:35	12:30		Employee Ownership Organizations	In this interactive session, leaders from employee-owned organizations around the world will share their experiences and insights on navigating change in an ever-evolving business landscape. Through an open conversation, participants will engage with these leaders to explore strategies for adapting to challenges, driving innovation, and sustaining growth within employee-owned businesses.	Tiara Letourneau , Director, Rewrite Capital Pascale Nieuwland-Jansen , Director, SNPI (Netherlands Participation Institute) Olivia Hansen , Consultant, Danish Business Authorities Karen Maquire , Chairperson, Employee Ownership Ireland (EOI) James de le Vingne , CEO, EOA James Bonham , President The Employee Ownership Foundation

Thu	11:35	12:30		Government Leaders	Government leaders from the England, Wales, Canada and Slovenia will share their insights and strategies on how they are fostering and supporting employee ownership as a pathway to economic stability, innovation, wealth distribution, and business succession.	Jane Page , Senior Manager Taxation, Kirk Rice LLP (moderator) Tony Loffreda , Senator (Quebec), Parliament of Canada Sharon Bowles , Parliamentary Office, House of Lords Sam Blakeborough , Policy & Partnerships Officer, Employee Ownership Association Anneliese Dodds , MP, Parliament of UK
Thu	11:35	12:30		How Wealth is Being Created in These US ESOP Transactions	Explore how ESOPs are driving wealth creation for employees, business owners, and organizations. This session highlights the tax advantages, financial growth, and cultural benefits of ESOPs, using real-world examples of successful transactions	Ali Jamshidi , CFO, CTL Engineering Ian MacFarland , CEO, EA Engineering Becky Streff , Chief People Officer, Holden Industries Regina Carls-JP Morgan (moderator)
Thu	11:35	12:30		Impact Investing & Employee Ownership	This interactive session aims to spark action and inspire change by encouraging dialogue, asking critical questions, and learning from the experiences of leaders in the field, focusing on how impact investors are increasingly aligning financial returns with positive social outcomes, with employee ownership models emerging as a key vehicle for achieving both.	John Buley , Professor of Finance, Duke University Tara Sabre Cottier , Director of Impact Investing, Chemonics
Thu	11:35	12:30		Involving Religious Organizations	Explore the role of religious organizations in promoting and supporting employee ownership as a means of fostering economic justice, community empowerment, and ethical business practices. Given their commitment to social justice and the well-being of individuals and communities, religious organizations can be powerful allies in the movement towards employee ownership.	Debora Fletcher , Founder & President, Sustainable Families David Alcock , Anthony Collins Solicitors LLP Chantal Carr , Hope Arising Rachel Miner , Bellwether International

Thu	12:30	13:35		Lunch & Introduction to the International Federation of Employee Ownership	Join James Bonham, President of The Employee Ownership Foundation, for an engaging lunchtime discussion as he introduces the International Federation of Employee Ownership, an initiative aimed at uniting and strengthening the employee ownership movement globally. Jim will provide an overview of the Federation's mission, vision, and goals, as well as the key strategies it will employ to formulate model public policy, public education, and resourcing within the employee ownership community.	James Bonham , President The Employee Ownership Foundation
Thu	13:35	13:45		Break		
CONCURRENT SESSIONS - Participants may choose their own topic and session in which to participate.						
Thu	13:45	14:40		Aligning International Leadership	Explore how the International Federation of Employee Ownership would serve as a unifying force, aligning leaders and organizations across borders to foster collaboration, share best practices, and advocate for policies that support employee ownership worldwide.	James Bonham , President The Employee Ownership Foundation
Thu	13:45	14:40		Complicated Legal Situations	This session focuses on the complicated legal issues that can arise in the realm of employee ownership, and effective strategies that can be used to avoid or prepare for these challenges.	Michael Golden , (Moderator) Senior Vice President, SES ESOP Strategies Ewan Hall , Director / Partner, Baxendale Employee Ownership Limited Marcus Piquet , Senior Managing Director, Ambrose Advisors
Thu	13:45	14:40		Involving Associations & Unions	Discuss how non-employee ownership focused associations can play a pivotal role in facilitating the transition to employee ownership. As advocates for their members, trade associations are uniquely positioned to support the implementation and sustainability of employee ownership models through education, resources, and advocacy.	Geert Janssens , Author, Chief Economist
Thu	13:45	14:40		Foundations and Think Tanks	In this facilitated conversation, leaders from foundations and think tanks will explore tangible strategies for collaboration, identifying key areas for impact, and developing actionable solutions that can advance employee ownership on a larger scale.	Matt Helmer , Managing Director, The Aspen Institute Frank Cumberbatch , Vice President, Bader Foundation

Thu	13:45	14:40		Starting and Operating a Regional Employee Ownership Center	Delve into the actionable insights and present a clear roadmap for establishing employee ownership centers that can make a meaningful difference.	Robert Scallon , IAFP Glen Dott , Scottish Enterprise Aaron Moberger , Board Member, Massachusetts Center for Employee Ownership
Thu	13:45	14:40		Participated Management in Employee Owned Social Enterprises	Come participate in an open session with two of the best known employee-owned social enterprises in the UK in a panel coordinated by one of the top participative management consultants in the country.	Jeremy Gadd , Founder, J Gadd Associates Sharon Lowrie , CEO, Be Caring Carl Cadman , Senior Community Manager, Provision House
Thu	14:40	14:50		Break		
Thu	14:50	15:45		Developing Employee Ownership Where the Majority of People Live and Work	This session will focus on strategies for expanding employee ownership in the places where the majority of people live and work—in countries where employees do not own or control an overwhelming number of shares. Discuss how employee ownership may grow in nations where tax advantages might not be a main driver of the growth of the movement.	Gonzalo Hernandez , Researcher, Iteso Jesuit University of Guadalajara Art Hosokawa , Chairman, Japan Employee Ownership Association Victorlia Sydorenko , Legal Senior Manager, Deloitte
Thu	15:45	16:05		Break		
Thu	16:05	17:50		Closing General Session	In this final interactive session, delegates will have the opportunity to share additional developments otherwise not covered within the program framework and revisit or reflect on the key insights, strategies, and discussions from the symposium. Participants are encouraged to engage in open dialogue, ask questions, and delve deeper into topics of interest, while exploring actionable steps and collaborative opportunities for advancing employee ownership in their organizations and communities. The session will highlight the most impactful moments, key takeaways, and reinforce the collective vision for the future of employee ownership.	(Co-facilitator) Dr. John Hoffmire , Center on Business and Poverty (Co-facilitator) James Bonham , President The Employee Ownership Foundation
Thu	17:50	18:30		Break		
Thu	18:30	19:00		Buses to Blenheim	Participants will board coaches for the short trip to Blenheim, the birthplace and childhood home of Sir Winston Churchill.	

Thu	19:00	21:15	Blenheim Palace, Blenheim Park, Woodstock OX20 1PS	Dinner and Closing Keynote - Blenheim Library	Closing keynote discussing the growing ownership crisis unfolding across local and regional economies globally and the exportation of wealth. The combined effect of aging business owners with limited or no meaningful succession plans with massive and escalating wealth accumulation within private investment funds are transforming and placing at risk the fundamental requirements for functioning economies.	James Bonham, The Employee Ownership Foundation
Thu	21:15			Buses return to Oxford		
Friday	08 August 2025					
Fri	12:00	14:00	Oxford to Heathrow	Kimberly Arndt, Sarah Mysciewicz, Isaac Batt, Daniel Chasen, Vanessa Aguiar Ground Transport	Ground Transport Oxford to Heathrow	N/A
Fri	12:00	14:00	Oxford to London	Michael Sinacore, Jared Sackett	Return ground transport to London	N/A
Fri	16:35:00	19:45:00	London Heathrow to Baltimore Washington (BWI)	Isaac Batt Return Flight	Return flight Heathrow to BWI	N/A
Fri	16:35:00	19:45:00	London Heathrow to Baltimore Washington (BWI)	Daniel Chasen Return Flight	Return flight Heathrow to BWI	N/A
Fri	16:40:00	20:00:00	London Heathrow to Washington Dulles (IAD)	Vanessa Aguiar Return Flight	Return flight Heathrow to Dulles	N/A
Fri	16:40:00	20:00:00	London Heathrow to Washington Dulles (IAD)	Sarah Mysiewicz Return Flight	Return flight Heathrow to Dulles	N/A
Fri	16:40:00	20:00:00	London Heathrow to Washington Dulles (IAD)	Kimberley Arndt Return Flight	Return flight Heathrow to Dulles	N/A
Monday	11 August 2025					
Monday	12:35 PM	16:00	London Heathrow to Washington Dulles (IAD)	Jared Sackett Return Flight	Return Flight Heathrow to Dulles	N/A