Manufacturers Resource Center
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Manufacturing Success

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Employee Stock Ownership Plans for Turbulent Times

Presenters:

Phillip DeDominicis, Managing Director - Investment Banking
Managing Director at Menke & Assoc., Inc.
Greater Philadelphia Area

William G. Stewart III
Executive V. P. , Wealth Management
Stewart Jones Wealth Advisory Group
of Janney Montgomery Scott, LLC

Prior to joining Menke & Associates, Phillip spent three years as Director of Investment Banking for the Mergers & Acquisitions Group of Citigroup in New York. Prior to that, he spent ten years as Director of Investment Banking for the Mergers, Acquisitions & Private Finance Group of Morgan Stanley. He received his degree in Chemical Engineering from the University of Delaware in l985, and his MBA degree in Finance and Accounting from the Anderson Graduate School of Management at UCLA in 1989.

William has over 30 years of experience in the financial industry, dating back to 1986 when his career began in New York with Kidder Peabody & Company. He was a Vice President and one of 20 Institutional Portfolio Management Consultants within Kidder Peabody's Consulting Group. When the firm was sold in 1994, he joined Smith Barney as one of only 50 Consulting Group Directors. In 1997, Donaldson, Lufkin & Jenrette recruited him to join the Firm as the National Manager of DLJ Consulting. Bill joined Legg Mason Wood Walker, Inc. in 2003 as a Senior Vice President and Senior Portfolio Consultant.

Webinar

October 27, 2020 | 10:30 –12:00 PM

Must register in advance. Please click link below:
https://us02web.zoom.us/meeting/register/tZIlc-yoqD8pHtWKrP-r6IVkFBKmARKFuE2V
After registering, you will receive a confirmation email containing information about joining the meeting.

Your level of personal success in the next season of your life will be determined by your responses to these and multiple other challenging issues. Employee Stock Ownership Plans (ESOPs) can align personal financial plans and timelines with business succession strategies to fit today's new reality. Topics of discussion will include:

Introduction to ESOPs

- Where, When and Why They Work—Creative solutions from the Great Recession Inform Today's Crisis
- The Plans, The Process and The Execution
- Exploring ESOPs in Turbulent Times: Why selling to an ESOP can be the optimal solution during disruptions.
- Are my financial resources sufficient to last through the next season of my life?
- Wrestling with liquidity challenges when timelines extend?

After you register, you will receive an email response that will include a link and password for the event. It will also include instructions for submitting questions during the webinar.

Target Audience: Business owners and senior executives

Cost: Complimentary, No Cost, but registration is required. *This event is made possible thanks to funding assistance through the MEP National Emergency Assistance Program.*

Register online also at
www.mrcpa.org/events