



The ESOP Association Membership Application

(a not-for-profit trade association)
Federal Tax #94-2478143

Company name: _____

Contact name: _____

Contact title: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone () _____ ext.: _____

Cell () _____

Fax () _____

E-mail: _____

Website: _____

Complete this Section for Corporate Membership ONLY:

Year company founded: _____

% of Co. owned by ESOP: _____%

Number of Active & Inactive ESOP participants: _____

Year ESOP established: _____

Has ESOP ever been leveraged? _____ Yes _____ No

Our company is: _____ Publicly traded _____ Closely held

C Corp _____ S Corp _____

Any other stock compensation plans: _____

Union: ___yes ___no If yes, union workforce in ESOP: ___yes ___no

Type of business: _____

Complete this Section for Professional Individual

Membership(s) ONLY: Please add these additional members from the same office location at \$325 each:

Name: _____

Title: _____

E-mail address: _____

Phone: _____ Fax: _____

Name: _____

Title: _____

E-mail address: _____

Phone: _____ Fax: _____

For ESOP Association office use only: National Website

Rec'd _____ Source _____ Pymt _____ Staff _____

Mbr Pkt: _____ Ch: _____ ID # _____ FYB _____

Payment Information:

I have enclosed a check in the amount of \$ _____

Please charge my _____ VISA, _____ MC, _____ AmEx \$ _____

Card # _____

Credit Card Security Code _____ Exp. Date ____/____/____

Authorized signature: _____

How Did You Hear About The ESOP Association?:

Referred by: _____

_____ Service Provider (name): _____
(i.e. lawyer, accountant, appraiser, etc.)

_____ Website _____ Media _____ Local Chapter

_____ Former Member _____ Mailing _____ Attended Conference

_____ Other: _____

Please Circle Membership Type:

Corporate Membership is strictly limited to companies with an employee stock ownership or similar plan. Annual dues are based on the number of participants in the plan (both active and inactive accounts).

Participants	Dues
1-99	\$ 620
100-249	845
250-499	1,245
500-999	1,635
1,000-1,999	2,475
2,000-4,999	3,280
5,000 and up	4,070

Affiliate Membership is open to those companies considering an employee stock ownership plan. The membership dues, for one year only, is \$565. Status is upgraded to regular voting membership upon formal installation of an ESOP.

Professional Individual Membership is open to persons from professional offices that provide services to ESOP companies. Annual dues of \$675 provide membership status to one individual from a service provider's office. Additional persons from the same office may become members for only \$325 per each individual. Persons from the same company, but in a different office location, must join as full professional members at \$675.

Professional Business Membership is open to a business entity that provides professional services to sponsors of ESOPs that permits any employee of that business entity to receive ESOP Association member services for that year. The annual dues are \$15,375. (Please attach a separate sheet of paper with the employees' names and complete contact information to be included under the Professional Business Membership.)

Educational Membership is open to full-time faculty members and students of accredited colleges and universities, and non-profit organizations working to promote the cause of employee ownership. The annual dues are \$155.

ESOP Association dues are not tax *deductible* as charitable contributions. However, they may be *deductible* as an ordinary and *necessary business expense*, to the extent they are not used for *government relations* activities. The percentage of ESOP Association dues used for *government relations* expenses is 20% of member dues revenue.

Mail to: The ESOP Association
Membership Department
1726 M Street, NW, Suite 501
Washington, DC 20036

OR FAX: (202) 293-7568

Questions: Toll Free 1(866) 366-3832

Or membership@esopassociation.org

Visit Us www.esopassociation.org