



(Employee Stock Ownership Program)



TRUCKEE, TAHOE EMPLOYEE STOCK OWNERSHIP PROGRAM

WHO WE ARE & WHY WE CARE

- Lisa Nigon
 - Resort at Squaw Creek
- Kayla Woods
 - Sierra Insurance Associates
- Dylan Crosby
 - Tahoe Forest Health District
- Kellen Babb
 - Truckee Sanitary District



TAHOE TRUCKEE ESOPS

Employee Stock Ownership Plans (ESOPS) are a way business owners can gift or sell ownership in their company to their employees through stock options. ESOPS are a great way for business owners to raise capital and invest in their employees. In return employers will experience an increase in productivity and a way to extend the longevity of their business through succession planning. ESOPS really can enable business owners another option than simply closing their doors when they are ready to retire in addition to providing tax benefits which trickle down to all levels of the business.

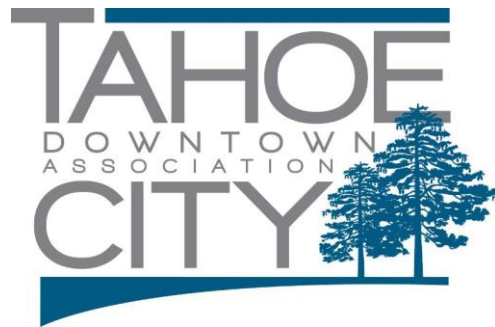
Our program will strive to educate local businesses about ESOPS and provide resources and information to help businesses leverage their capital. This will be done through creating marketing materials and a website, by creating a Truckee-Tahoe ESOP community, facilitating grant applications and holding informational webinars.



REAL TALK – WHAT IS AN ESOP?



TARGET GROUP



TRUCKEE, TAHOE EMPLOYEE STOCK OWNERSHIP PROGRAM

REAL TRUCKEE STORY



TRUCKEE, TAHOE EMPLOYEE STOCK OWNERSHIP PROGRAM

NEEDS ASSESSMENT

Our Community is Struggling

- Businesses are struggling raise capital and find and keep qualified employees
- Workforce housing is scarce and expensive
- We are missing a sustainable 4-season middle class
- Population is aging and business owners want to retire someday

WE all want to solve these problems

ESOPs are one way WE can

Ex. Mountain Hardware

For our needs assessment we chose to utilize a survey to get first hand opinions from both business owners in our community as well as employees!



SURVEY RESULTS – EMPLOYEES

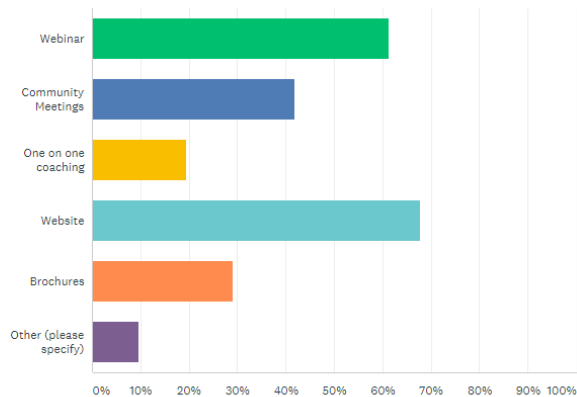
- Employee Survey

- 31 Responses

- 58% said they are not prepared for retirement
 - 61% are interested in partial owners of a company
 - 83% people are interested in building equity in addition to being compensated for their work
 - 61% were interested in learning more about ESOPS

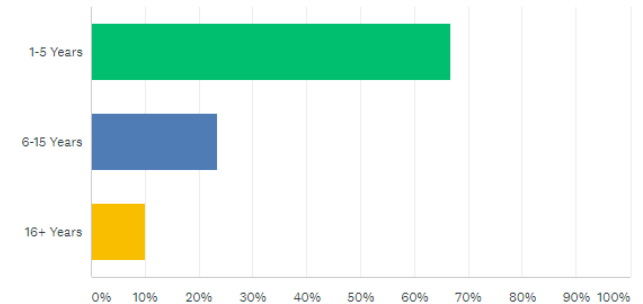
Which format would you be most likely to participate in to learn more about ESOPS? You may select more than one.

Answered: 31 Skipped: 0



How long have you worked for your current employer?

Answered: 30 Skipped: 1



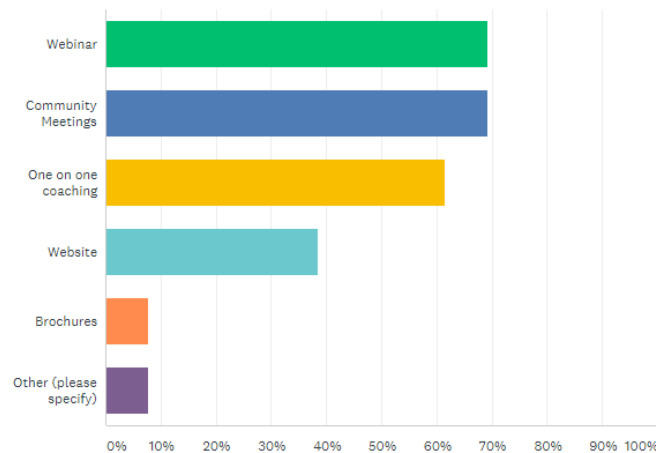
SURVEY RESULTS – BUSINESS OWNERS

- Business Owner Survey

- 14 Responses
 - 43% were interested in learning more
 - 64% have had issues with finding and keeping good employees
 - 50% did not have a plan for retirement

Which format would you be most likely to participate in to learn more about ESOPs? You may select more than one.

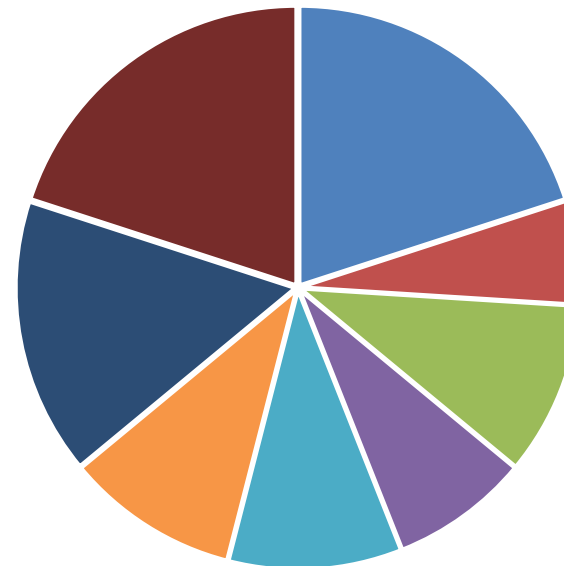
Answered: 13 Skipped: 1



BUDGET

- **Total \$5,000**

- **Newspaper Presence:** Sierra Sun, Moonshine Ink \$1000
- **Logo:** \$300
- **E-Newsletter:** To be dispersed through SBA, NTBA, Truckee Donner Chamber, CATT, and Tahoe Downtown Assoc. \$500
- **Radio Commercial:** \$400
- **Truckee Thursday Booth:** \$500
- **Event Planning/Props:** \$500
- **Website:** \$800
- **Grant Writing:** \$1,000



■ Newspaper ■ Logo ■ E-media ■ Radio Media
■ TT Booth ■ Events ■ Website ■ Grant Writing



MARKETING PLAN



LOGO

EBLAST

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WHAT IS AN ESOP? IS IT RIGHT FOR ME?

Employee Stock Ownership Plans (ESOPs) are a way a business owner can gift or sell ownership in their company to their employees through their business. ESOPs are a great way for business owners to raise capital and invest in their employees. Our program, Tahoe Truckee ESOP, was created to educate local businesses about ESOPs and provide resources and opportunities to help businesses leverage their capital.

[LEARN MORE](#)

RETIRE WITH A PLAN AND PROVIDE AN ADDED BENEFIT FOR YOUR EMPLOYEES.

ESOPs can take a small team and give business and help the owner succeed by creating stock that is owned by their employees. And why else do you give your employees? Have more ownership in the company and more control. It can also make selling the business a lot easier when it comes time.

[READ MORE](#)

TAX BENEFITS FROM ESOPs.

Yes, it is true. With an ESOP you can have your own and still get a tax. The tax benefits of having an ESOP can be used to cover the costs to set up and transfer funds. Business owners and employees. Read this article for more information on how the tax benefits of an ESOP can save your business money while at the same time opening up more ways of funding capital to succeed.

[READ MORE](#)

UTILIZE AN ESOP TO TAKE YOUR BUSINESS TO NEW LEVELS.

Business owners can actually leverage and become more active and more efficient by creating an ESOP. There are different ways to set up your ESOP and we will address the different factors involved. It is important to have your business for sale work in it ahead of time. Then you may want to look into having an ESOP.

[READ MORE](#)

WEBINARS, CONNECTIONS AND MORE.

There is a lot of information out there about ESOPs and we know it can be confusing. We want to make the ESOP program as accessible as possible. We have you to our webinars and learn more about the Tahoe Truckee ESOP program. Our webinars are held in our region, webinars created by experts, conducted in the area and more.

[VISIT OUR WEBSITE](#)

FOLLOW



CONTACT

Phone: 530.584.5555
Address: PO Box 123, Truckee, CA 96161

TAHOE LOCAL? TAKE OUR SURVEY



WHAT IS AN ESOP BUSINESS OWNERS EMPLOYEES WEBINARS GRANT PROGRAM



ARE YOU READY FOR RETIREMENT?

[LEARN MORE](#)



ABOUT TAHOE TRUCKEE ESOPs

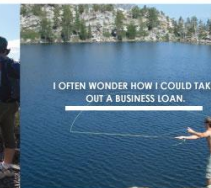
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I WANT TO RETIRE SOMEDAY BUT WHAT DO I DO WITH MY BUSINESS?



I WISH MY EMPLOYEES WERE MORE INVESTED IN MY COMPANY.



I OFTEN WONDER HOW I COULD TAKE OUT A BUSINESS LOAN.



I WISH I HAD A SUCCESSION PLAN IN PLACE.

WANT TO KNOW MORE?

Sign up for our Newsletter

FOLLOW



CONTACT

Email: info@tahoetruckeesop.com
Phone: 530.584.5555
Address: PO Box 123, Truckee, CA 96161

OTHER RESOURCES

Truckee Chamber
North Lake Tahoe Chamber
Sierra Nevada Business Council
Sierra Nevada Insurance



TRUCKEE, TAHOE EMPLOYEE STOCK OWNERSHIP PROGRAM

WEBSITE

ESOP COMMUNITY

- Why does it all matter?
- I am.....
 - Tired of seeing friends have to move away
 - Hoping to own my own business some day
 - Disappointed to see small businesses struggling and closing their doors
 - I enjoy financial strategy



BY FUNDING OUR PROJECT YOU WILL...

- Help spread the word of ESOPs
- Allow businesses to connect with a pro for one on one consultation
- Help fund webinars
- Connect businesses in the community



BY FUNDING OUR PROJECT YOU WILL...

- By a show of hands, how many have you known someone who.....
 - Had to move away because they couldn't afford housing?
 - Closed their business because they couldn't afford rent?
 - Struggled to find 4-season employment?
 - Could benefit from forming an ESOP as a business owner or joining an ESOP as an employee?

Starts here. Continues with all of you!

