

The Power of Employee Ownership

Employee ownership is a powerful growth strategy and succession plan that strengthens business, creates quality jobs, and builds lasting wealth.

Competitive Advantage

Employee-owned companies have higher profits, higher productivity, and are more resilient.

Wealth Building

Employee ownership offers tax advantages, profit sharing, and improved company financial health.

Preserves Legacy

Employee ownership preserves small businesses, local jobs, and community economic stability.

Who We Are

We're here to help business owners understand their options for employee ownership by meeting with them, connecting them, and cheering them on-the whole way.

What We Do

We connect people to our Florida Center Network so they can access expert guidance, insights, and resources that help owners, advisors, and decision-makers understand the impact of employee ownership.

SCAN ME

TO CONNECT

STRONG BUSINESSES.

STRONG ECONOMIES.

STRONG COMMUNITIES.

FLCEO

FLORIDA CENTER FOR EMPLOYEE OWNERSHIP

www.flceo.org

Employee Ownership

Good for Business. Good for the U.S.



Employee ownership builds a stronger, more invested workforce and lasting wealth for owners, employees, and communities.

Traditional EO Models

Employee Stock Ownership Plan (ESOP)

A retirement plan that owns all or part of the company on for its employees — the most common form of broad-based employee ownership in the US.

Ideal Criteria
20 to 100K *Employees*
$1.5M *Net Profits*

- ✓ Significant tax benefits
- ✓ Cost-free to employees
- ✓ Federally regulated

Worker Cooperative

Owned and controlled by its workers, who share in profits and elect and serve on the Board — with employee and community benefit at its core.

Ideal Criteria
5 to 3K *Employees*
Profitable Revenue Stream

- ✓ Democratic governance
- ✓ Equitable profit-sharing
- ✓ Low setup costs

Employee Ownership Trust (EOT)

A trust that holds some or all company shares on behalf of its employees — structured as a Perpetual Purpose Trust to benefit the workforce.

Ideal Criteria
5+ *Employees*
Profitable Revenue Stream

- ✓ Flexible and simple
- ✓ Low setup costs
- ✓ Cost-free to employees

Emerging EO Models

Equity Compensation/ Direct Ownership

Consider this: *workforces of any size might consider direct ownership options*

Five basic kinds of individual equity compensation plans, each providing employees with some special consideration in price or terms.

- **Stock Options**
- **Restricted Stock & RSUs**
- **Stock Appreciation Rights (SARs)**
- **Phantom Stock**
- **Employee Stock Purchase Plans (ESPPs)**

Being Acquired by an ESOP Company

Consider this: *good option for companies that are too small for an ESOP*

Selling to an ESOP-owned company can work much like any other sale: you sell your shares, or the company sells its assets. In some cases, you might first set up an ESOP in your own business, sell to it, and then merge with the buyer's ESOP. Tax outcomes vary based on the companies and how the deal is structured.

LEAVE A LEGACY | **BUILD WEALTH** | **PROTECT JOBS** | **ELEVATE BUSINESS**

We're on a mission to expand employee ownership across Florida empowering workers, creating jobs, and driving economic prosperity.

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