

AGENDA

DAY TWO - JUNE 3, 2026

The Aspen Institute
2300 N Street NW Suite 700
Washington DC 20037

EMPLOYEE OWNERSHIP IDEAS FORUM



9:00 Breakfast and Networking

10:00 Welcome Remarks

- **Paula D'Ambrosa**, Director, Inclusive Wealth-Building, Prudential Financial

10:15 Five Big Ideas

- **Sara Horowitz**, Founder of the Mutualist Society, Founder of the Freelancers Union
- **Esteban Kelly**, Executive Director, The US Federation of Worker Cooperatives
- **Sean-Tamba Matthew**, Shareholder, Stevens & Lee and SES ESOP Strategies
- **Ginny Vanderslice**, Principal Emeritus, Praxis Consulting Group
- **Felipe Witchger**, Executive Director, Francesco Collaborative and the Catholic Impact Investing Collaborative

11:00 Keynote Speaker – **Margot Brandenburg**, Senior Program Officer, Mission Investments, The Ford Foundation

11:10 Panel – Moving Institutional Capital into Employee Ownership

- **Regina Carls**, Managing Director and Head of ESOP Advisory, JPMorganChase
- **Jim Sorenson**, Founder and CEO, Sorenson Impact Foundation
- **Chavon Sutton**, Managing Director, Sustainable and Impact Investing, Cambridge Associates, LLC
- **Emily Thomas**, Executive Director and Head of Investing with Impact, Morgan Stanley Wealth Management
- **Jack Moriarty (moderator)**, Executive Director, Lafayette Square Institute

12:00 Keynote Speaker – **Bharat Ramamurti**, Former Deputy Director, National Economic Council of the United States

12:05 Preview of Lunch Discussions from the Purpose Trust Ownership Network and Transform Finance

12:15 Lunch Conversations

- **Employee Ownership Trusts**, led by Jenny Everett and Issie Corvi, Purpose Trust Ownership Network. 2nd Floor Conference Room; meet by the 8th floor elevators.
- **Impact Framework for EO Investing: Project Update and Discussion**, led by Julie Menter and Amelia Ahl, Transform Finance. Penner Conference Room, 8th floor.

1:15 Panel – Shifting Culture to Advance Employee Ownership

- **Evan Edwards**, CEO and President, Project Equity
- **Melissa Hoover**, Director of Ownership Culture, Apis & Heritage
- **Chris Mackin**, Founder, Ownership Associates, Partner, American Working Capital
- **Anna-Lisa Miller**, Executive Director, Ownership Works
- **Adria Scharf (moderator)**, Assistant Professor, Senior Associate Director, Institute for the Study of Employee Ownership and Profit Sharing, Director of the Curriculum Library for Employee Ownership, Rutgers School of Management and Labor Relations

2:15 Attendee Breakout Conversations

- **Employee Ownership Capital Roadmap**, led by Alison Lingane, Founder, Ownership Capital Lab. Gildenhorn Room, 7th floor.
- **Entrepreneurship Through Acquisition and Employee Ownership**, led by Sean-Tamba Matthew, Shareholder, Stevens & Lee and SES ESOP Strategies. Penner Conference Room, 8th floor.
- **Employee Ownership Research**, led by Adria Scharf, Assistant Professor, Senior Associate Director, Institute for the Study of Employee Ownership and Profit Sharing, Director of the Curriculum Library for Employee Ownership, Rutgers School of Management and Labor Relations. Steel Conference Room, 7th floor.

3:15 Break

3:45 Panel – Ownership During the AI Revolution

- **Deric Cheng**, Director of Research, Windfall Trust
- **Anthony Cimino**, Head of Federal Affairs, Anthropic
- **Zoë B Cullen**, Michael B. Kim Associate Professor of Business Administration, Harvard Business School
- **Richard Freeman**, Herbert Ascherman Chair in Economics, Harvard University
- **Liba Wenig Rubenstein (moderator)**, Director, Future of Work Initiative at the Economic Opportunities Program, The Aspen Institute

4:55 Closing Remarks

5:00 Reception

To learn more about today's speakers and discussions, scan the QR code to the right or visit as.pn/eoforum26

We are grateful to our Forum Champions – the Ford Foundation, Prudential Financial, the Sorenson Impact Foundation, JPMorganChase, and EO Equals – for their principal support of the Forum. We also thank McKinsey & Company, a Forum Ally, for its generous contribution.