



## 2017 Group Training Class

September 27-28, 2017

Convene

30 South 17<sup>th</sup> St. Philadelphia, PA

The Telescope™ Group Training Class is an intensive, hands-on class that will help you learn to use Telescope efficiently and effectively. Participants will work through the process of performing an ESOP repurchase obligation study from start to finish using the new, web-based version of Telescope. The class will include:

- Performing a historical analysis of company turnover
- Formatting and uploading census data
- Discussing plan provisions and financial assumptions, and entering data in Telescope
- Analyzing and interpreting results
- Creating a meaningful report for the Board of Directors

The Group Training Class is ideal for those who are new to Telescope—whether your company just subscribed to the software, or if the responsibility for doing the projections has been transitioned to a new person. Participants must have basic knowledge of Microsoft Excel and ESOPs.

Prior to the class, attendees will be asked to gather and review materials for their repurchase obligation study and attend two webinars.

The cost is \$1,799 per attendee if you sign up before June 30, and \$1,899 per attendee otherwise. You must be a current Telescope subscriber to qualify for this class. Register at <http://www.esopeconomics.com/grouptraining>. Attendance will be limited to 15 people.

### Important Dates

- **Friday, June 30** – Early bird registration deadline
- **Friday, Aug 11** – Registration deadline
- **Tuesday, Aug 22**, 2 pm - 3 pm Eastern Time- 1st Webinar (will be recorded)
  - Gathering data for study, with a focus on preparing your census and allocation file, including a discussion about employee groups.
- **Tuesday, Sept 5**, 2 pm - 3 pm Eastern Time - 2nd Webinar (will be recorded)
  - Discussion about data for historical turnover analysis. Also, answering your questions, assessing reasonableness of assumptions, etc.
- **Wednesday & Thursday, Sept 27-28** - Telescope Group Training Class in Philadelphia, PA

## **Payment and Cancellation Policy**

Invoices will be sent upon registration. Payment is due upon receipt of invoice. Credit cards are not accepted. If you need to cancel your reservation at any time, the following rules apply:

- Registrations cancelled up to 10 business days prior to the start of class are subject to a \$500 cancellation fee.
- Registrations cancelled less than 10 business days prior to the start of class are subject to a \$1,000 cancellation fee.
- Registrants who hold reservations and fail to attend will not receive a refund.

ESOP Economics reserves the right to cancel any class more than 30 days prior to the start date of the class. In such instances, our liability is limited to the full refund of the registration fee.

## **What Previous Attendees Are Saying**

*"The class was very worthwhile. It was valuable to me to listen to the explanations of why certain options were chosen, and understand different ways to double check my data."*

*"The class is hands-on - using your own census, your own plan document, and NO distractions! The turnover analysis was also a great help. It gave a much more realistic rate than traditional calcs from HR."*

*"The staff was gracious and very knowledgeable."*

**Please contact us at 215-606-3600 or [support@esopecoconomics.com](mailto:support@esopecoconomics.com) with any questions or if you would like further information about any of our Telescope support options.**