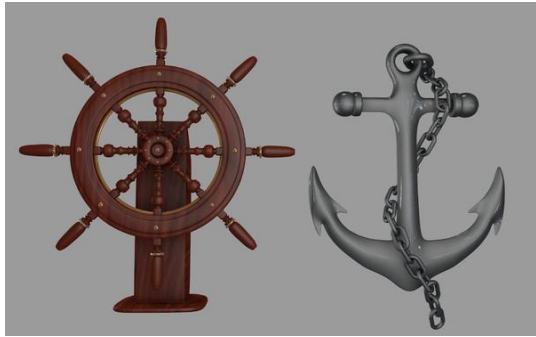


Anchors Away! The ESOP Fleet



2014 New England Chapter Annual Conference

Track 1	Commander - Technical	Marriott Ballroom Salon A
Track 2	Chief Petty Officer - Developing Leaders	Marriott Ballroom Salon B&C
Track 3	Crew - Culture Club	Marriott Ballroom Salon F
Track 4	Admirals - Chief Track	Conference Room 7
	CEO Roundtable	Conference Room 5
	CFO Roundtable	Conference Room 7

Thursday, October 2, 2014

1:00 pm – 3:00 pm 1300 -1500 hours	Sonalysts Company Visit – Waterford, CT
4:00 pm – 5:15 pm 1600 – 1715 hours	<p><i>ESOP 101</i> <i>Conference Room 7</i></p> <p>Speaker: <u>David Guadagnoli</u> Sullivan & Worcester</p>
4:00 pm – 5:15 pm 1600 – 1715 hours	Chapter Council Meeting Marriott Ballroom (A)
6:30 pm – 7:30 pm 1830 – 1930 hours	Cocktail Reception Marriott Ballroom (D,E,F)
7:30 pm – 11:00 pm 1930 – 2300 hours	Awards Banquet & Entertainment Marriott Ballroom (D,E,F)

Friday, October 3, 2014

7:00am – 8:10 am 0700 - 0810 hours	Continental Breakfast & Registration Marriott Ballroom (D)			
8:10 am – 8:30 am 0810 – 0830 hours	Welcome – Mark Adams, New England Chapter President Marriott Ballroom (D)			
Tracks	<u>Track 1</u>	<u>Track 2</u>	<u>Track 3</u>	<u>Track 4</u>
8:30 am – 9:30 am 0830 – 0930 hours	<p><i>Legal Update</i></p> <p>Speakers:</p> <p><u>Rob Schatz</u> Schatz, Brown, Glassman, Kossow, LLP</p> <p><u>Ben Wells</u> Dinsmore & Shohl, LLP</p>	<p><i>Enhance Productivity & Engagement Through Positivity</i></p> <p>Speaker:</p> <p><u>Janet Edmundson M.Ed</u> JME Insights sPeak Performance</p>	<p><i>Getting started – Establishing ESOP Committees to Enhance Communication Within Your Company</i></p> <p>Speakers:</p> <p><u>Connie Woodmansee</u> Swerdlin & Company</p> <p><u>Maria Prado</u> Rex-Cut Abrasives</p> <p><u>Pat Roy</u> Web Industries</p>	<p><i>How Does ESOP figure into your Strategic Planning?</i></p> <p>Speakers:</p> <p><u>Steve Voigt</u> The King Arthur Flour Company</p> <p><u>Mick Lamond</u> Newport Harbor Corporation</p> <p><u>Mary Bihrlle</u> Hypertherm</p>
9:30 am – 9:45 am 0930 – 0945 hours	Break			

<p>9:45 am – 10:45 am 0945 – 1045 hours</p>	<p><i>Trustee Process Requirements</i></p> <p>Speakers:</p> <p><u>Merri Ash</u> First Bankers Trust Services, Inc.</p> <p><u>Tabitha Croscut</u> Steiker Fischer Edwards & Greenapple P.C.</p> <p><u>Chuck Coyne</u> Empire Valuation Consultants, Inc.</p>	<p><i>Yes, and... Improvisation, Engagement and Development</i></p> <p>Speaker:</p> <p><u>Jon Sweigart</u> Praxis Consulting Group</p>	<p><i>ESOP 201: What have you always wanted to know about your ESOP but were afraid to ask?</i></p> <p>Facilitator:</p> <p><u>Mike Lucas</u> Fred C. Church Insurance</p> <p>Panel:</p> <p><u>Cecilia Loftus</u> Prairie Capital Advisors, Inc.</p> <p><u>Al Harrington</u> Web Industries, Inc.</p> <p><u>David Benoit</u> Swerdlin & Company</p>	<p><i>CEO Roundtable</i></p> <p>Facilitator:</p> <p><u>Alex Moss</u> Praxis Consulting Group</p> <hr/> <p><i>CFO Roundtable</i></p> <p>Facilitator:</p> <p><u>Cindy Turcot</u> Gardeners' Supply Company</p>
<p>10:45 am – 11:00 am 1045 – 1100 hours</p>	<p>Break</p>			
<p>11:00 am – 12:00 pm 1100 – 1200 hours</p>	<p><i>Managing Repurchase Obligation</i></p> <p>Speakers:</p> <p><u>Barbara Clough</u> Blue Ridge ESOP Associates</p> <p><u>Michael McGinley</u> Prairie Capital Advisors, Inc.</p> <p><u>Tina DiCroce</u> ESOP Economics, Inc.</p>	<p><i>Leading Diverse Employee Owners</i></p> <p>Speaker:</p> <p><u>Dan Marcue</u> The ESOP Association</p>	<p><i>Developing and Implementing a Formal Community Volunteer Program</i></p> <p>Speakers:</p> <p><u>Rene Tallion</u> Web Industries, Inc.</p> <p><u>Jane Moss</u> Hypertherm</p> <p><u>Suzanne McDowell</u> The King Arthur Flour Company</p>	<p><i>CEO Roundtable</i></p> <p>Facilitator:</p> <p><u>Alex Moss</u> Praxis Consulting Group</p> <hr/> <p><i>CFO Roundtable</i></p> <p>Facilitator:</p> <p><u>Cindy Turcot</u> Gardeners' Supply Company</p>
<p>12:00 pm – 1:30 pm 1200 -1330 hours</p>	<p>Lunch Marriott Ballroom (F)</p>			

<p>1:30 pm – 2:30 pm 1330 -1430 hours</p>	<p><i>Key Controls for ESOP Companies</i></p> <p>Speakers:</p> <p><u>Terry Griswold</u> Empire Valuation Consultants, Inc.</p> <p><u>Sandra Pappajohn</u> BerryDunn</p> <p><u>Lori Stuart</u> Crowe Horwath</p>	<p><i>Bridging the Skills Gap from Line to Leader</i></p> <p>Speakers:</p> <p><u>Veronica Ortiz</u> Web Industries, Inc.</p> <p><u>Bruce Bumpus</u> Web Industries, Inc.</p>	<p><i>Rocking the Mic – How to deliver a “Rocking” presentation</i></p> <p>Speakers:</p> <p><u>Wayne Violette</u> BL Companies</p> <p><u>Rebecca Riordan</u> Country Curtains</p> <p><u>Dave Fitz-Gerald</u> Carris Reels, Inc.</p>	<p><i>Engaging the Board & Executives in Leadership Assessment & Succession Planning</i></p> <p>Speakers:</p> <p><u>Kathleen McInerney Kane</u> Praxis Consulting Group</p> <p><u>Nancie Zane</u> Praxis Consulting Group</p>
<p>2:30 pm – 2:45 pm 1430 – 1445 hours</p> <p style="text-align: center;">Break</p>				
<p>2:45 pm – 3:45 pm 1445 – 1545 hours</p>	<p><i>ESOP Q&A – Anything & Everything</i></p> <p>Speakers:</p> <p><u>Larry Clark</u> Sonalysts</p> <p><u>Kjersti Cory</u> Bankers Trust</p> <p><u>Ken Pia</u> Myers, Harrison & Pia, LLC.</p>	<p><i>Translating Complex Financials</i></p> <p>Speakers:</p> <p><u>John Murphy</u> Atlantic Management</p> <p><u>David Perry</u> Concord Lumber</p>	<p><i>Nifty Fifty</i></p> <p>Panel:</p> <p><u>Mark Ruskin</u> Carris Reels</p> <p><u>James Lamond</u> Rex-Cut Abrasives</p>	<p><i>Alternative Approaches to Executive Compensation</i></p> <p>Speakers:</p> <p><u>Bill Enck</u> BerryDunn</p> <p><u>Joe Marx</u> Principal Financial Group</p>
<p>3:45 pm 1545 hours</p> <p style="text-align: center;">Wrap-Up and Adjourn</p>				



***Thank you for your support of The New England Chapter of
The ESOP Association***