

Troubleshoot, Reboot or Refresh Your ESOP!

We all know that the complexity of ESOPs can be frustrating — often even more frustrating than waiting for a huge webpage to download on a dial up connection. That complexity, though, is the functioning motherboard that enables all the great things ESOPs can do to make our lives better. So, if you're feeling down about it, never fear, the California/Western States Chapter of The ESOP Association is here to help. Just think of us as the Geek Squad of ESOPs - coming to help you troubleshoot or even reboot your basic ESOP knowledge!

The California/Western States Chapter of the ESOP Association is proud to present its 2012 Spring Seminar Series entitled "Troubleshoot, Reboot or Refresh Your ESOP!"

Whether you are new to ESOPs or have a burning operational issue or just want a refresher course in how ESOPs really work, this Seminar is for you! At the Seminar, you will be able to deal with your own burning ESOP issues as well as learn the answers to timeless questions such as:

- What is the difference between the ESOP's third party administrator and the ESOP's Plan Administrator?
- How do I know if my ESOP is tax qualified?
- What is the difference between an ESOP committee and an ESOP trustee?
- What is an employee ownership culture and how do I get one?

At each location, our morning speakers will explain the basic administrative, legal, governance, valuation, and communication topics that you need to know to make sure that your ESOP is running at its highest efficiency.

Following the morning presentation, the attendees will network and share their experiences and questions at a hosted working lunch (provided by one of our always generous member companies).

In the afternoon, you'll be able to network with speakers from other ESOP companies who are there to download their ESOP experiences and lead a discussion on what worked, what did not work and what they would do if they had it all to do over again. Think of it as an Open Source ESOP meeting, so come join the chat room on ways to communicate your ESOP that are fun and user friendly!



Registration Fees

\$ 50 ESOP Association Members \$ 35 ea. additional ESOP Assoc. Member
\$ 75 Non-Member

All seminars are scheduled from 9:00 a.m. — 3:00 p.m.

Lunch is included with your registration fee.

Register online at:

http://www.esopassociation.org/chapters/CAWS_events.asp

Need additional information?

Call us at 916-333-3280 or email registration@caws-esop.org

Denver

Monday, March 26

New Belgium Brewing Co., Inc.
500 Linden St.
Fort Collins, Colorado

Speakers

Karen Ng, Sedgwick LLP
Margo Ferguson, GH Phipps Construction Companies
Gena Cooper, Alpine Bank

San Diego

Monday, March 26

R.W. Smith
8555 Miralani Drive
San Diego, California

Speakers

Paige Ryan, ESOP Services, Inc.
Mark Bernstein, Carl Warren & Company
Sepideh Hayes, Hot Dog On A Stick

San Francisco

Tuesday, March 27

Recology
50 California St., 24th Floor
San Francisco, California

Speakers

Tony Mathews, The Beyster Institute
Mike Davidson, Gardeners' Guild
Kristina Cox, Recology
Ciro Giammona, Harrell Remodeling, Inc.

Phoenix

Wednesday, March 28

Sundt Construction
2620 South 55th Street
Tempe, Arizona

Speakers

Lynn Dubois, Sheppard, Mullin
Carol Peabody, Sundt Construction
Stefan Dicks, Trendwood, Inc.
Libby Lentz, Pima Medical Institute

Sacramento

Thursday, March 29

Building Materials Distributors (BMD)
225 Elm Avenue
Galt, California

Speakers

Chuck Bachman, Menke & Associates
Laurie Salter, Building Materials Dist. (BMD)
Doug Wright, Mountain Hardware & Sports
Albert Brown, TESCO

Los Angeles

Friday, March 30

Entertainment Partners
2835 N. Naomi St.
Burbank, California

Speakers

Jeremy Pelphrey, Brucker & Morra, APC
Ron Cogan, Entertainment Partners
Elsa Atayan, Travel Store, Inc.
Amanda Versluys, Hannibal Industries, Inc.

Salt Lake City

Tuesday, April 3

MonaVie
10855 South River Front Parkway
South Jordan, Utah

Speakers

Kim Blaugher, The Principal Financial Group
Bill Flader, Caltrol, Inc.





TROUBLESHOOT

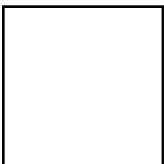


REBOOT



REFRESH

YOUR ESOP!



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