

# *ESOP March Madness in Madison*



## THE WISCONSIN CHAPTER OF THE ESOP ASSOCIATION CHAPTER MEETING AND AWARDS SOCIAL



Wednesday, March 3, 2010

12:30 - 5:30 pm

Crowne Plaza Hotel • Madison, WI 53704

### **Score 3 Courtside Tickets to the Hottest Game in Town: Badgers vs. Iowa Hawkeyes**

*Register for the conference by February 19 to automatically be entered in a drawing for one of three courtside tickets to the ball game. The game is at Kohl Center immediately following the meeting. Register a coworker or friend for the meeting and be entered twice! Winners will be announced on Friday, February 26, so you have enough time to make arrangements to attend the game.*



**Blue Ridge ESOP Associates**

## ESOP MARCH MADNESS IN MADISON CONFERENCE AGENDA

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### 12:30 – 1:00 pm Registration & Refreshments

#### 1:00 pm **Welcome, Introductions, Chapter Business, Awards Presentation**

Meet the 2010 Wisconsin ESOP Chapter Officers and Committee Members  
Learn what the chapter has in store for you in 2010  
Preview the Chapter's New Website  
Cheer as the 2010 Wisconsin ESOP Chapter Award Winners Are Announced  
*Betty Bollis - Chapter President and Chapter Officers*

#### 1:20 pm **Governance in Action!**

After a brief review of basic ESOP governance principles, a panel of Wisconsin ESOP companies will share how they have structured their boards and trustees.

- ❖ How did they decide on the structure?
- ❖ How did they recruit members?
- ❖ What do they like about their structure and what would they like to improve?

We will also survey the audience members about their practices.

*Mickey Maier, Alpha Investment Consulting Group*

*Jim Cairns, Bukacek Construction*

*Mark Krueger, Temperature Systems, Inc.*

#### 2:15 pm **Break**

#### 2:30 pm **The Economy - Where Have We Been, Where Are We Going?**

Receive valuable insights during a panel discussion on how companies are dealing with today's business climate. We hope this will be an interactive session where you can ask questions and share your thoughts and ideas on the topics. Some of the discussion points include:

- ❖ How has today's economy affected your relationship with your lender?
- ❖ What is the impact on your valuation?
- ❖ Has it impacted your distribution policies?
- ❖ How have you upheld employee moral?
- ❖ What communication tactics have you used with employees?

*Tim Stewart, DeWitt Ross Stevens SC*

*Craig Olinger, Enterprise Services, Inc.*

*Fred Schwertfeger, Horicon Bank*

*Mark Willey, Western Building Products*

#### 3:15 pm **Government – Get Involved!**

This session will review current ESOP legislative and regulatory hot topics, the 2009 legislative efforts of Wisconsin ESOP Companies, and the 2010 plans for visiting congressional representatives in Washington D.C., as well as a discussion on how you and your company can help with ESOP advocacy.

*Aaron Juckett, ESOP Insourcing*

*Paul Karch, Godfrey & Kahn*

*Sherri McDermott, Sentry Equipment*

*Sandy Paavola, Enterprise Services, Inc.*

#### 4:15 pm **Award Winners Reception**

**You are invited to stay and celebrate with chapter award winners as you enjoy complimentary beverages and appetizers!**

***NOTE: There is still time to submit your award application! The application deadline has been extended to Friday, February 12. To access the form, select the following link: [2010 WIESOP Chapter Award Applications](#)***  
*Conference program subject to change.*



**THE WISCONSIN CHAPTER of THE ESOP ASSOCIATION  
MARCH ESOP MADNESS IN MADISON  
MARCH 3, 2010 • CROWNE PLAZA HOTEL**

4402 E Washington Avenue • Madison, WI 53704 • [www.crowneplaza.com/madison-etown](http://www.crowneplaza.com/madison-etown) • 608-244-4703 or 1-800-404-7630

**REGISTRATION FORM**

	<u>On or Before February 19, 2010</u>	<u>After February 19, 2010</u>
<b>Members:</b>	\$65 per person (1st & 2nd registrant) \$50 per person (3rd registrant)	\$75 per person (1st & 2nd registrant) \$60 per person (3rd registrant)
<b>Non-Members:</b>	\$75 per person	\$90 per person
<b>At the Door:</b>	\$85 per person	

**See Below for Crowne Plaza Room Reservation Information**

**Cancellation Policy:** No refunds will be given after February 23, 2010. You may send a substitute from your company at no additional charge.

Name(s): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Email: \_\_\_\_\_

Amount Enclosed: \$\_\_\_\_\_ (check made payable to **THE ESOP ASSOCIATION**)

**Credit Card Payment**

Card Member Name: \_\_\_\_\_

Credit Card Type: \_\_\_AmEx \_\_\_MasterCard \_\_\_Visa

Credit Card # \_\_\_\_\_

Exp. Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Amount: \_\_\_\_\_

Signature: \_\_\_\_\_

**Send to:**  
**Donna Walseth**  
**906 97<sup>th</sup> Lane NE**  
**Blaine, MN 55434**

**Phone: 763-785-4122**  
**FAX: 763-785-4168**  
[\*\*dmwalseth@msn.com\*\*](mailto:dmwalseth@msn.com)

**THANK YOU!**

**Crowne Plaza Room Reservations Special Room Rate: \$109 for the evening of 3/2/10.**

**Reserve by February 12, for special rate.**

**1-800-404-7630 or 608-244-4703 Request: ESOP Association Group**