

News

What's Inside

Message from the President

2007 Highlights

Chapter Officers

2008 Schedule

The ESOP Association
Wisconsin Chapter

The ESOP Association - WI Chapter
c/o Jean Blaney - Chapter Administrator
P.O. Box 273
Appleton, WI 54912-0273

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SERVICES, INC.
ESOP Valuations & Consulting



2007 Highlights

Meetings

April, 2007

Sharing Bright Ideas was the theme of our Spring Conference held in Pewaukee on April 18th. The meeting was sponsored by Crowe Chisek, Enterprise Services, Principal Financial Group, and Kretz Lumber Company.



22 TEA member companies were represented with a total number of 80 attendees.

Dan Marcue from Woodward Communications shared communication strategies used within this multiple location employee-owned company. A spirited discussion on empowering and encouraging employee owners was led by Steve Voigt of King Arthur Flour, an ESOP company with a full time staff of 165 and a full time/seasonal staff total of 285. ESOP Games for Profit and Fun presented by Jim Bado from Workplace Development, Inc. was an interactive session outlining the keys to adult

learning and creative ways to instill ownership culture in your business. A legislative update and round table discussions on various ESOP topics including trustee issues, communications, committees, diversification and other ESOP topics rounded out the day.

A huge thank you to all of our sponsors, speakers and facilitators that made our first meeting of the year a great success.



Fun & Games for profit and fun.

August, 2007

Our summer meeting, On Wisconsin!, was held on August 9th in the Madison area. The day started off with a company story and tour at Trachte Building Systems in Sun Prairie. A surprise visit by Bucky Badger, UW's mascot, made for great photo opportunities as we learned from Senator Mark Miller from the 16th district on how best to contact our elected officials and make sure our voices are heard. After a quick lunch, we boarded buses to our state capitol in Madison where our tour guide shared the grandeur and history of this beautiful building. A special thank you to our sponsors Richards Benefits & Financial Services, Amerequip Corporation, Enterprise Services, and Trachte Building Systems.



Jeff Seefeldt, President, Trachte Building Systems, gives company story.



Wisconsin Senator Mark Miller & Bucky Badger (in foreground) along with 39 attendees representing 12 TEA member companies.

From the President



This past year was one of success for our Chapter, as demonstrated in meetings filled with information and networking opportunities on how to make our employee-owned companies better. Looking forward to 2008, the Chapter's Executive Committee wants to continue to increase membership and active participation in meetings.

Our membership program, "Invite an Employee Owner," was successful and we look forward to continuing the program. Our Spring meeting will continue to include breakout sessions to capitalize on opportunities for learning.

As Chapter President, I'd like to take this opportunity to express how important employee ownership and the benefits of a TEA membership are. I look forward to seeing you in 2008!

Pam Klute
President


The ESOP Association, Wisconsin Chapter




In an effort to keep chapter costs down and still keep you informed of upcoming activities, the WI chapter uses email to share information.

Make the most of your TEA membership!

Don't miss TEA WI Chapter communications! Be sure to enter jean22@new.rr.com into your address book.



You're invited to submit an entry for the 2008 AACE awards sponsored by The ESOP Association. Presented in recognition of members' outstanding ESOP communications programs, the deadline for entries is Monday, March 3rd. Find out more about the AACE awards at www.esopassociation.org.



Beginning in 2008, the Wisconsin Chapter will provide conference participants with a **Certificate of Attendance**, if requested. You may find this helpful for continuing education purposes.

2008 MEETINGS



Mark Your Calendars

Spring Conference April 15, 2008

Country Springs Hotel
Waukesha

Plan to join us for a full day filled with educational topics, networking, and breakout sessions. A keynote presentation by Ms. Frieda Takaki, President/CEO of CHART Rehabilitation of Hawaii and Chair of The ESOP Association, is sure to set the tone for sharing ESOP ideas.

ESOPs Onsite

Watch for details on a half day visit to an ESOP company to network with other employee owners.

CEO/CFO Roundtable June 10, 2008

Sentry Equipment
Oconomowoc

Back by popular demand, this morning is dedicated to a facilitated open discussion on issues related to running an effective ESOP company. The meeting is for CEOs and CFOs of ESOP companies, concurrent sessions will be held for each peer group.

Fall Conference August 20, 2008

Miller Park
Milwaukee

Details are being finalized for our 2008 summer event. The agenda will include a discussion on preparing for Employee Ownership Month. After the session, we will enjoy a social function at Miller Park as the Milwaukee Brewers take on the Houston Astros.

2008 Meetings and Conferences Sponsored by:



Richards Benefits & Financial Services

2007 Highlights

Our fifth annual CEO/CFO Roundtable was hosted on June 12th by Quest Technologies in Oconomowoc again this year. The meeting was attended by 22 individuals representing 13 TEA companies. Feedback continued to be positive—the CEOs and CFOs in attendance enjoyed the new half day format and found the facilitated open discussions and networking robust and beneficial.

Thanks to our facilitators: Mike Festge, CEO, from Amerequip Corporation and Ken Williams, CFO, from Ruekert & Mielke, Inc. A special thanks to our sponsors Appleton, Bukaceck Construction, Sentry Equipment Corp. and Quest Technologies.

“Each year I pick up something new or interesting when I attend the CEO/CFO meeting. It has been a great opportunity to network with other ESOP CFO’s and find out what they are doing as far as trustees, record keepers or items being voted on by ESOP participants of some companies.”

- Gary Brochtrup

2007 Highlights



WI ESOP Company of the Year
Industrial Electric Wire & Cable



WI ESOP Employee of the Year
Betty Bollis
Amerequip Corporation



Current Wisconsin Chapter Officers
From left: Jean Blaney, Sandy Paavola, Scott Freund, Betty Bollis, Sherri McDermott, Pam Klute.

Other Executive Committee Members (*not pictured*): Ken Williams, Erica Roberts, Laura Beckman, Aaron Juckett.

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There's still time to submit your nomination for WI's ESOP employee and/or ESOP company of the year. Contact a Chapter Officer with your nomination. **Deadline is January 31st.**