

# News

WI ESOP Chapter  
c/o Jean Blaney - Chapter Administrator  
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## ***What's Inside***

*Message from the President*

*2006 Highlights*

*Chapter Officers*

*2007 Schedule*

Newsletter sponsored by: **ESI** ENTERPRISE SERVICES, INC.  
ESOP Valuations & Consultants



## 2006 Highlights

### Meetings

#### April, 2006

The first meeting of 2006, titled “Tools for Building ESOP Success,” was held on April 5<sup>th</sup> in Appleton at Principal Financial Group’s offices. The meeting was sponsored by Principal, Enterprise Services, and Keller.

Total Water Treatment Systems shared its ESOP story, including how the past and present owners decided to share ownership with their employees. David G. Anderson—district director for



*Anderson addresses group*

Congressman Tom Petri—led an advocacy session, providing insights on how to reach and communicate effectively with your legislators.

After a networking lunch, the afternoon was divided between two tracks. The technical track included a repurchase obligation



*15 TEA member companies were represented with a total number of 59 attendees.*

session and an ‘Ask the Experts’ panel discussion where owners brought their own administration, valuation, and legal questions. The communications track held concurrent programs on communication tools including press releases, and how to spark creativity in an ownership culture.

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

#### August, 2006

Our summer meeting, “Winning ESOP Communications Strategies,” kicked off with a general session at Ruekert Mielke’s offices in Waukesha. Ruekert Mielke shared its company story and how it inspires employee ownership and participation, followed by a session on common



*Ruekert-Mielke shares company story*

communication problems and solutions by Victor Aspengren, of Paragon International.

We moved down the road to Miller Park for a tailgate lunch and raffle of donated items from member companies to benefit the Employee Ownership Foundation. Then members enjoyed the afternoon with networking and a



*Employee Ownership Foundation Raffle*

Brewers win inside the stadium. A special thank you to our sponsors: Amerequip Corporation, TBS, Trachte Building Systems, Ruekert Mielke, and Enterprise Services.



*9 TEA member companies were represented, with a total of 46 attendees.*



*Gwenn Rosenthal, from TEA National*

## From the President



I am so excited to get this third annual Wisconsin Chapter newsletter into your hands.

2006 was a year of many successes for the Wisconsin Chapter. My first year as chapter President was a great opportunity to continue promoting employee ownership and the many benefits of being a TEA member.

Our 2006 meetings were filled with information and networking opportunities to learn more about how to make our employee-owned companies better. As we look forward to 2007, the Chapter's Executive Committee has set a goal of increasing membership and active participation in chapter meetings. We are working on several initiatives toward achieving that goal. In 2006 we introduced a new membership program called "Invite an Employee Owner," where prospective ESOP companies attended our 2006 meetings to see first hand what the WI Chapter has to offer ESOP companies. We look forward to continuing the program in 2007. Second, our Spring meeting will continue to include afternoon breakout sessions so that you have more opportunities for learning. Third, we've listed information about our 2007 meetings on the last page of this newsletter so that you can put the dates in your calendar and plan to join us.

Finally, as a state chapter we are part of a national organization. The ESOP Association sponsors many terrific conferences throughout the year – including the Annual Conference in Washington DC (May 15-16) and the Two-Day Technical Conference in Las Vegas (November 8-9). For more information on all the local and national conferences, please check out the website ([www.esopassociation.org](http://www.esopassociation.org)).

I look forward to seeing you at our 2007 Wisconsin Chapter meetings!

Pam Klute  
President  
The ESOP Association, Wisconsin Chapter

# 2007 MEETINGS



## Mark Your Calendars

### Spring Conference April 18, 2007

Country Springs Hotel  
Waukesha

A general morning session filled with education and an ESOP story shared by Woodward Communications. Then an afternoon of concurrent roundtable sessions covering topics including repurchase obligation, diversification, communications, and fiduciary and corporate governance issues. Plan to join us!

### CEO/CFO Roundtable June 12, 2007

Quest Technologies  
Oconomowoc

Back by popular demand, this day 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 and concurrent sessions will be held for each peer group. CEOs and CFOs mark your calendars now for this networking opportunity.

### Fall Conference August 9, 2007

Trachte Building Systems,  
Sun Prairie  
State Capitol,  
Madison

Details are being finalized for our final event of 2007. After the session at Trachte, we plan to board a chartered bus for the short trip to Madison for a guided tour of the Capitol Building.

### 2007 Meetings and Conferences Sponsored by:



Amerequip Corporation ~ Bukacek Construction  
Kretz Lumber Company ~ Sentry Equipment Corporation

## 2006 Highlights

The CEO/CFO Roundtable was hosted on June 13<sup>th</sup> by Quest Technologies in Oconomowoc again this year. The meeting was attended by 16 individuals representing 9 TEA companies. Feedback from this our 4<sup>th</sup> annual event, continued to be positive—the CEOs and CFOs in attendance found the facilitated open discussion and networking beneficial.

*“Excellent practical roundtable discussion with peer group of ESOP CFOs. We addressed numerous topics and I learned from other companies’ experiences.”*

*- Attendee Comment*

Thanks for our facilitators: Steve Sheppard, Retired CEO of Foldcraft Company, and Grif Mason, Retired President from McKay Nursery. A special thank you to our member sponsors: Quest Technologies and TSI - Temperature Systems, Inc.

## Chapter Officers

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## 2006 Highlights



*WI ESOP Company of the Year*  
**Ruekert Mielke**

Ken Williams, CFO, accepting the award for Ruekert Mielke.



*WI ESOP Employee of the Year*  
**Heidi Tunak**  
Quest Technologies

Heide accepting the award joined by fellow Quest colleagues.



**Current Wisconsin Chapter Officers**

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



There's still time to submit your nomination for 2007's ESOP employee of the year and/or ESOP company of the year. **Deadline is January 29th.**