

# News

## ***What's Inside***

*Message from the President*

*2005 Highlights*

*Chapter Officers*

*2006 Schedule*

***Wisconsin Chapter  
The ESOP Association***

WI ESOP Chapter  
c/o Jean Blaney - Chapter Administrator  
815 S. Pierce Avenue  
Appleton, WI 54914

The ESOP Association, Wisconsin Chapter  
815 S. Pierce Avenue  
Appleton, WI 54914



## 2005 Highlights

### Meetings

#### April, 2005

The first meeting of 2005, held on April 13th in Waukesha at the Country Springs Hotel, was sponsored by Appleton, Enterprise Services, and Trachte Building Systems.

CC&N, Inc. shared their ESOP story, including how it has driven its continued growth over the past eighteen years of operations. J. Michael Keeling, President of TEA, presented a legislative and government relations update for the general session.



*Rocky Soper of CC&N tells their ESOP story.*

After a networking lunch, the afternoon was divided between two tracks. The technical track covered fiduciary and S-Corporation issues, while the communication track focused on ESOP month and resources available through national.

A big thank you to all of our sponsors and speakers that made our first meeting offering multiple tracks a huge success!



*J. Michael Keeling, President of TEA, presenting.*



*Twenty-two TEA member companies were represented with a total number of 78 attendees.*

#### August, 2005

Lambeau Field was the venue for our summer meeting on August 10th. Keller Structures shared their ESOP story covering how employee owners help define its culture and how they've worked to inspire ownership.



*Twelve TEA member companies were represented, with a total of 52 attendees.*

Steven Sheppard, CEO of Foldcraft Company, presented "Why I Left My Wife and Kids for ESOP." Steve shared insights to the benefits and possible dangers of being an active employee owner.

A raffle of donated items from member companies was held to benefit the Employee Ownership Foundation. Our chapter raised \$220 for the foundation!

A networking luncheon and group tours of the "Frozen Tundra" were held in the afternoon. A



*Steven Sheppard addresses the group.*

fun time was had by all on this wonderful day. A special thank you to our sponsors: Enterprise Services, Amerequip, and Western Building Products.



*The group at Lambeau.*

## From the President



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

2005 was a year of successes and change for the Wisconsin Chapter. In July I was appointed the new chapter President. I am very excited having the opportunity to continue promoting employee ownership and the many benefits of being a TEA member.

Our 2005 meetings were filled with information and networking opportunities to learn more about how to make our employee-owned companies better. I would like to take a moment to extend a "Thank You" to both our 2005 and 2006 sponsors. As we look forward to 2006, the Chapter 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. First we are pleased to announce we will be introducing a new membership program called "Invite an Employee Owner." Details outlining this new exciting program will be released in March 2006. Second, our Spring meeting will continue to include two tracks of afternoon breakout sessions so that you have more opportunities for learning. Third, we've again listed information about our 2006 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 17-18) and the Two-Day Technical Conference in Las Vegas (November 9-10). For more information on all the national conferences, please check out the website ([www.esopassociation.org](http://www.esopassociation.org)).

I look forward to seeing you at our 2006 Wisconsin Chapter meetings!

Pam Klute  
President  
The ESOP Association, Wisconsin Chapter

## 2006 MEETINGS



### Mark Your Calendars

#### Spring Conference April 5, 2006

Principal Financial Group  
Appleton, WI

Learn the steps and processes to being an advocate for your ESOP with your Congressional Representative. Plus an afternoon filled with both technical and communication topics. Look for registration information soon and plan on attending!

Sponsored by:

**ESI** ENTERPRISE SERVICES, INC.



#### CEO/CFO Roundtable June 13, 2006

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.

Sponsored by:



#### Fall Conference August 24, 2006

Ruekert Mielke - Waukesha, WI  
Miller Park - Milwaukee, WI

Details are being finalized for our final event of the year. After the session, enjoy a social function held at Miller Park - the Milwaukee Brewers take on the Houston Astros.

Sponsored by:



**ESI** ENTERPRISE SERVICES, INC.



## 2005 Highlights

The CEO/CFO Roundtable was hosted by Quest Technologies in Oconomowoc on June 14th. It was attended by 19 individuals representing twelve TEA companies. Feedback from this, our 3rd annual event, continued to be positive - the CEOs and CFOs that attended found the facilitated open discussion and networking beneficial.

Thanks to our facilitators, Alex Moss from Praxis Consulting Group and Cindy Prodoehl from Principal Financial Group. A special thank you to our member sponsors: Quest Technologies, Keller, and KRM Information Systems.

## Chapter Officers

President  
**Ms. Pam Klute**  
 Trachte Building Systems, Inc.  
 314 Wilburn Road  
 Sun Prairie, Wisconsin 53590-1469  
 608-327-3156 FAX: 608-825-2606  
 Email: pklute@trachte.com

Vice President  
**Ms. Sherri A. McDermott**  
 Sentry Equipment Corp.  
 856 East Armour Road  
 Oconomowoc, Wisconsin 53066-3943  
 262-567-7256 FAX: 262-567-4523  
 Email: sherri@sentry-equip.com

Vice President  
**Ms. Betty Bollis**  
 Amerequip Corporation  
 1015 Calumet Avenue  
 Kiel, Wisconsin 53042-9624  
 920-894-7063 FAX: 920-894-3799  
 Email: bbollis@amerequip.com

Treasurer  
**Ms. Sandy Paavola, AVA**  
 Enterprise Services, Inc.  
 894 Williamstowne, Suite F  
 Delafield, Wisconsin 53018  
 262-646-6490 FAX: 262-646-6499  
 Email: spaavola@esi-enterprise.com

Secretary  
**Mr. Scott Freund**  
 Principal Financial Group  
 P.O. Box 477  
 Appleton, Wisconsin 54912-0477  
 920-882-4654 FAX: 920-734-9180  
 Email: freund.scott@principal.com

Administrator  
**Ms. Jean Blaney**  
 Wisconsin State Chapter  
 815 South Pierce Avenue  
 Appleton, Wisconsin 54914-5418  
 920-830-4976 FAX: 920-830-5853  
 Email: jean22@new.rr.com

## 2005 Highlights



*WI ESOP Company of the Year*  
**Amerequip Corporation**

Amerequip was also awarded 2nd place for AACE (*Annual Awards for Communication Excellence*) at TEA's national conference.



*WI ESOP Employee of the Year*  
*National ESOP Employee of the Year*  
**Karen Toth** (center)  
 Antigo Cheese Company



*Chapter Award for*  
*Membership Recruitment*  
**Wisconsin Chapter Officers**  
 (from left: Sherri McDermott, Scott Freund, Pam Klute, Carol Wheeler, Betty Bollis, Sandy Paavola)