

Wisconsin ESOP Chapter's Summer Meeting

Monday, June 10th
Pyle Center at UW-ECC



2019 Wisconsin Platinum Sponsors:



9:00 – 9:20 am Registration & Continental Breakfast
9:20 – 9:30 am Welcome/Opening Comments

3rd Floor Conference Center

CEO, CFO and Board of Directors Track

9:30 – 10:30 Session #1

Key Decisions for ESOP Companies with an Acquisition Strategy

Whether you are a new ESOP or a mature ESOP, this session will provide options and guidance for your strategy about ESOP sustainability.

OwnersEdge executives will share their acquisition strategy, process and key decisions to ensure growth, accretive share value and cultural fit.

OwnersEdge is a 100% ESOP owned holding company with a diversified acquisition strategy. In the last two years, OwnersEdge has acquired four companies with plans to acquire four additional companies by 2025. The goal in sharing their strategy, process and key decisions is to show how an ESOP organization can be an attractive exit strategy for business owners. *Presenters: Christine Adeo & Lynnette Fritz, OwnersEdge Inc.*

10:30 – 10:45 Break

10:45 – 11:45 Session #2

Redeem, Recycle, Re-leverage, Rebalance, Reshuffle – the Five R's

What are they, how do they work, and how can you implement them to manage your ESOP for long term sustainability. A multi-perspective view from legal, administrative, financial, and the real world.

Presenters: Ryan Graham, Chartwell Financial Advisory; Scott Rademacher, Blue Ridge ESOP Associates; Tim Stewart, DeWitt Law Firm. Moderator: Victor Aspengren, Prairie Capital Financial

11:45 – 12:45 Lunch

AT&T Lounge (1st Floor)

1:00 – 2:00 Combined Roundtable Discussions

Exclusive to CEO, CFO and other executive leaders of ESOP Companies to engage in a facilitated open discussion on leading an effective ESOP company. Roundtable participants will determine the agenda topics such as creating an ownership culture, best practices concerning corporate governance, repurchase obligation planning, 401(k) matches with ESOP stock, acquisitions, etc. *Facilitated by Victor Aspengren*

2:15 – 3:15 Roundtable Open Discussions:

CEO Roundtable

Exclusively for ESOP Company CEOs, COOs and top ESOP company executives. This discussion will focus on topics important to company leadership. *Facilitated by Victor Aspengren*

CFO Roundtable

This discussion will be targeting issues facing ESOP company CFOs, Vice Presidents of Finance, Treasurers, Directors of Accounting, Controllers and Assistant Controllers. *Facilitated by Ken Williams*

Human Resources & Communications Track

9:30 – 10:30 Roundtable Open Discussions:

Human Resources

HR Directors, Managers and those in charge of personnel issues will engage in discussions on topics such as: hiring strategies with ESOPs, interviewing for employee ownership qualities, introducing the ESOP to new employees, and more.

Communications Committees

Discussion will focus on: Committee Best Practices, Tips for Communicating Your ESOP, Developing an Ownership Culture, Effective Communication Materials (newsletters, games, events), and more.

10:30 – 10:45 Break

10:45 – 11:45 Resume Roundtable Discussions

11:45 – 12:45 Lunch

AT&T Lounge (1st Floor)

1:00 – 2:00 Session #1

Reviving your ESOP Committee Through Growth and Mergers/Acquisitions

OwnersEdge is a 100% ESOP owned holding company that has acquired four companies in the last two years with plans to acquire four additional companies by 2025. We will give you a look at how our ESOP committee had to adjust with the growth and strategy of our organization to have a lasting impact on our employee owners. With each business having their own distinct culture, our ESOP committee continues to focus on bringing all of the employee owners together. Whether you are an ESOP committee starting out or growing through mergers and acquisitions, this session will provide insight on how we changed our committee structure and increased our employee owner engagement during times of growth while focusing on four specific missions, engaging our leaders and implementing an annual planning meeting. This session is targeted to anyone looking to modify or reenergize their ESOP committee. *Presenters: Karen Bell & Emilie Poehlmann, OwnersEdge Inc.*

2:00 – 2:15 Break

2:15 – 3:15 Session #2

Engaging Ideas for Employee Ownership Month

This exciting session will focus on how to engage and educate employee owners on the unique, nontraditional benefits associated with employee ownership through games. This session will cover common themes and games that have been used by a variety of Wisconsin-based ESOP companies during Employee Ownership Month. *Moderated by Jason Wellman, ESOP Partners*