



2018 New South Chapter Fall Conference

Track 1	Culture & Communications Workshops	
Track 2	Technical Round Tables	

Wednesday, September 19, 2018

5:00 pm - 7:00 pm	Welcome Reception
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Thursday, September 20, 2018

7:30 am - 8:45 am	Continental Breakfast & Registration
8:00 pm - 8:30 pm	<i>Welcome</i> Eloise Kisgen - New South Chapter President
8:45 am - 11:15 am	CEO Roundtable <i>Facilitated by: Linshuang, Praxis Consulting Group</i>
	CFO Roundtable <i>Facilitated by: Adrian Loud, Censeo Advisors</i>
	HR/Communications Roundtable <i>Facilitated by: Nelson Parrish, Praxis Consulting Group</i>

Tracks	Track 1 Culture & Communications	Track 2 Technical
8:45 am - 11:30 am	<p align="center">The People's Roundtable</p> <p>Interactive Workshop – A series of “Build to Last” activities that focus on developing successful communication and team building programs for employee owners of all generations.</p> <p><i>Moderator: Carrie Green, GIS, Inc.</i></p> <p><i>Panelists: Dolores Lawrence, Blue Ridge ESOP Associates; Lindsay Baublitz, SC&H Capital, David Harris, Southard Financial LLC</i></p>	<p align="center">The Techy's Roundtable</p> <p>Interactive Workshop – A series of discussions that focus on governance and other technical issues for ESOP trustees, service providers, advisors, and employee owners who just want to know more about how things work.</p> <p><i>Moderator: David Joffe, Bradley</i></p> <p><i>Panelists: Maria Thiel, Principal Financial Group; Steve Martin, Argent Trust Company; Miguel Paredes, Prudent Fiduciary Services</i></p>
11:30 pm - 12:30 pm	Lunch	
12:30 pm - 1:30 pm	<p align="center">Employee Owners Role in the Performance of an ESOP Company</p> <p>How to positively affect the long-term performance and value of YOUR company.</p> <p><i>Speakers: Ralph Owens, Expense Reduction Analysts</i></p>	<p align="center">ESOP Sustainability Strategies</p> <p>Explore options for coordinating traditional and evolving corporate strategies for financial and cultural success in an ESOP company.</p> <p><i>Speakers: Kelly Finnell, Executive Financial Services; Thomas Scaliase, Cornerstone Benefits</i></p>
1:30 pm - 1:45 pm	Break	
1:45 pm - 2:45 pm	<p align="center">Generational Communications</p> <p>We are all in this together! Explore specific strategies and Best Practices to unite three workforce generations toward common goals – Baby Boomers, GenXers, & Millennials.</p> <p><i>Speakers: Maureen Clayton, Nest Egg; Kevin Bupp, GIS, Inc.</i></p>	<p align="center">Valuation Best Practices</p> <p>This session analyses ESOP / M&A parallels and differences to address some of the “mysteries” and misunderstandings of establishing fair market value for multiple purposes over the life of an ESOP company.</p> <p><i>Moderator: Howard Kaplan, Kaplan Fiduciary Services</i></p> <p><i>Panelists: Mark Klopfenstein, PCE Investment Bankers; Paul Trost, JP Morgan; Eric Johnson, Prairie Financial Advisors</i></p>
2:45 pm - 3:00 pm	Break	

3:00 p m - 4:00 p m	<p style="text-align: center;">The Great Debate: Discussion on ESOP Sustainability</p> <p>ESOP companies face unique challenges and how those challenges are addressed vary from company to company. In true debate fashion, a panel of ESOP “experts” will “debate” some hot topics. The discussion will address both sides of the issues and where there may be room to compromise. Join us for a lively debate and bring your questions for our panel. Snacks and soft drinks provided. Sit back and enjoy. You get to judge the winners!</p> <p><i>Facilitator: Linshuang Lu, Praxis Consulting Group</i></p> <p><i>Panelists: Vicki Graft, Swerdlin & Company; Howard Kaplan, Kaplan Fiduciary Services; Maureen Clayton, Nest Egg Communications; Tom Stafford, Krieg Devault</i></p>
4:00 p m	Adjourn

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