



NY/NJ Chapter Spring ESOP Conference

April 5, 2018

Century Club, Syracuse, NY

THURSDAY, APRIL 5, 2018

7:30 am - 8:30 am	Registration and Continental Breakfast
8:30 am - 8:45 am	Welcome – Larry Filipski, NY/NJ Chapter President
8:45 am - 9:30 am	<p>Impact of Tax Cuts & Jobs Act 2017 on Business Valuation <i>Scott Brace, Empire Valuation Consultants; Rob Brown, ESOP Plus</i></p> <p>This keynote session will provide a greater understanding of the recent changes resulting from the Tax Cuts and Jobs Act of 2017.</p>
9:30 am - 9:45 am	Break
9:45 am – 11:00 am	<p>Employee Workforce Recognition & Validation: A Case Study <i>Steve Blowers, Once Again Nut Butter; Larry Filipski, Once Again Nut Butter</i></p> <p>This session will dive into a process implemented to recognize employee leadership potential as well as to provide a training matrix which is available for customers and visitors to be able to demonstrate employees' capabilities with respect to running their products.</p>
11:00 am – 11:15 am	Break
11:15 am – 12:30 pm	<p>ESOPoly <i>Ruthanne Bulman, McFarland Johnson, Inc.</i></p> <p>This workshop session will involve discussion about ideas to increase employee-owner engagement. Ruthanne will discuss the idea generation, implementation and results for ESOPoly, a fun, energizing way to communicate challenging material to employee-owners.</p>
12:30 pm – 1:30 pm	Networking Lunch

1:30 pm – 2:45 pm	Communicating Value to Participants <i>Andy O'Neill, Prairie Capital Advisors; Bret Keisling, Capital Trustees, Rob Hilton, Katz, Sapper & Miller</i> A discussion of communicating value to participants, incorporating elements such as newness to ESOPs, financial literacy of participants, information sharing practices of management, among others.
2:45 pm	Adjourn