



Wisconsin ESOP Chapter's Summer Meeting

Monday, June 4th

Pyle Center at UW-ECC

702 Langdon Street Madison, Wisconsin 53706

9:00 – 9:20 am

Registration & Continental Breakfast

3rd Floor Conference Center

9:20 – 9:30 am

Welcome/Opening Comments

CEO, CFO and Board of Directors Track

9:30 – 10:30 Session #1

Creating an Effective Board of Directors

The session will address board stages, board remuneration, recruitment, development, and the strategic complexities in an ESOP. Bring your questions, be willing to share your data, and walk away with some valuable information to evolve your board of directors to the next level.

Presenter: Victor Aspengren, Prairie Capital Advisors

10:30 – 10:45 Break

10:45 – 11:45 Session #2

ESOP Companies and their Boards: What do Trustees Want to See?

Hear from an ESOP Trustee and ESOP Attorney as they cover the various publicly-disseminated settlement agreements between the Department of Labor and various ESOP trustees to help ESOP companies understand the “best practices” with respect to building and maintaining a board of directors in an ESOP company.

Presenters: John “Mickey” Maier, Professional Fiduciary Services & Tim Stewart, DeWitt Ross & Stevens

11:45 – 12:45 Lunch

AT&T Lounge (1st Floor)

1:00 – 2:00 Combined Roundtable Discussions

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 executive. This discussion will focus on topics important to company leadership. *Facilitated by Victor Aspengren*

CFO Roundtable

The discussion will be targeted on 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

Launching & Relaunching Your ESOP

Does your ESOP Committee struggle with providing impactful, proactive educational materials for fellow employee-owners? This is a must-see communication-focused presentation featuring survey results from over two dozen ESOP committees throughout the country.

Presenter: Jason Wellman, ESOP Partners

2:00 – 2:15 Break

2:15 – 3:15 Session #2

Translating Education in Action

Did you pick up lots of good ideas at a conference or meeting and now wonder how to use it? Come to this session to hear ways to DRIVE what you learned back to your organization, employee owners and fellow committee members.

Presenter: Dan Marcue, The ESOP Association

Enjoy the afternoon by taking advantage of what the area has to offer, Memorial Union Terrace is just steps away from Pyle Center!

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Summer Meeting Silver Sponsor: Crowe Horwath LLP