



Capitalizing on Employee Ownership Roundtables & Golf Event



Tuesday, June 24, 2014 at Western Lakes Golf Club

W287 N1963 Oakton Road • Pewaukee, WI • 262-691-0900

http://www.westernlakes.com/WLGC_Directions.aspx

8:00 a.m. Registration and Continental Breakfast

8:30 a.m. Introductions, Welcome & Chapter Business – Chapter Officers

9:00 a.m. Morning Roundtables

Ever wonder what other ESOP companies are doing? Here is your chance to ask questions, share ideas and engage in facilitated open discussion with other employee owners in your field. Participants will be encouraged to ask questions and share ideas. Roundtables (with the exception of the CEO Roundtable) are open to all attendees.



CEOs: This forum will focus on issues important to company leadership. ONLY CEOs, COOs, or top executives in charge of day-to-day operations may participate.

Facilitator: Brian Baker, CEO, Sentry Equipment Corp.

CFOs: The discussion will be targeted on issues facing CFOs, Vice Presidents of Finance, Treasurers, Directors of Accounting, Controllers and Assistant Controllers.

Facilitator: Mary Stenvig, Director of Finance, Realityworks

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.

Facilitator: Sherri McDermott, Human Resources VP, Sentry Equipment Corp.

ESOP 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.

Facilitators: Lynnette Fritz, VP of Human Resources and ESOP Committee Executive Liaison, CC&N and NEXT Electric;

Dori Ross, Global Organization Development Manager and ESOP Committee Advisory Manager, IEWC

Professional Member Forum: Professional members are invited to discuss issues, network, and exchange ideas. (Professional members may join in the CFO, Human Resources or ESOP Committees roundtables as well.)

Facilitator: Mickey Maier, Professional Fiduciary Services

11:10 a.m. Burger & Brats Buffet

11:45 a.m. Golf Preparation

12:00 Noon: 18 Hole Scramble Golf Tournament

NEW THIS YEAR: SHOTGUN START AT 12 NOON!

Being a good golfer is not a requirement. The tournament is a best ball scramble. Contests, prizes, goodie bags, beverage tickets and more guarantee an afternoon of FUN, relaxation, and networking!



FORMAT: Scramble Play.

Each foursome tees off and the team selects the best of the four shots. Everyone hits their second shot from that location. Play continues for each shot of the round.

Registration fee includes:

Complimentary putting green and driving range, golf, cart, beverage tickets, give-aways, & awards social. Golfers will participate in FUN contests and games including 4 hole-in-one contests with prizes valued up to \$5,500!

Improve your score: "Gimmie Strings" available for sale during check in.

Register as an individual or sponsor a foursome and conduct a hole contest. See registration form for details.

Thank You Sponsors!

(Hole sponsors at the time of printing)

Blue Ridge ESOP Associates

Chartwell Capital Solutions

DeWitt Ross & Stevens S.C.

ESI

ESOP Partners

Hatco Corporation

Prairie Capital Advisors

Principal Financial Group

Sentry Equipment Corp.

Awards Social Immediately Following Play

Hole contest and tournament winners announced at a brief awards social immediately following play.



Play for a cause! A portion of funds raised will be contributed to The Employee Ownership Foundation on behalf of Wisconsin ESOP Chapter members.



Roundtables & Employee Ownership Foundation Golf Outing Tuesday, June 24, 2014 • Western Lakes Golf Club Registration Form

Qty.	Amount	Description
	\$500.00	Hole Sponsor/Foursome: Signage at hole, 18 hole scramble event for 4, breakfast, morning meeting, lunch, cart, beverages, awards reception. Hole sponsors may host a contest or give-away at hole. One hole contest staff will receive complimentary beverage tickets and may attend the awards social. (Meeting Only registration required for hole contest staff wishing to attend the roundtables session.)
	\$100.00	Individual: Breakfast, roundtables meeting, 18 hole scramble golf, lunch, cart, beverages, awards reception. You will be paired with other individual golfers or you may list your foursome on the form.
	\$200.00	Hole Contest Only: Not a golfer? Don't be left out of the fun! Sponsor a hole and conduct a game, contest or give-away. Sponsorship includes: signage at hole, lunch, beverage tickets and awards reception for one hole contest staff person. (Roundtables meeting registration not included.)
	\$60.00	Roundtables meeting only (breakfast and lunch included.)
		Prize donation or golf goodie bag item. (Gift certificates, golf balls, clubs, visors, tees, towels, suntan lotion, etc.) Specify: _____
		YES: I am a hole sponsor and want to host a contest. (See separate flyer for hole contest ideas.) Feel free to be creative and come up with your own. Contact Donna Walseth, dwalseth@esopexec.org , with your prize donation or hole contest idea.

\$ _____ **Total Due** **Checks Payable to: The ESOP Association**

Card Type	<input type="radio"/> VISA <input type="radio"/> MCard <input type="radio"/> AmEx				
Card Number					
Name on Card			Exp. Date		Code
Billing Address					

Cancellation Policy:** Cancellations must be received in writing, via fax or email, no later than 7 full business days prior to the program in order to qualify for a refund. Substitutes always accepted. "No-Shows" will be charged the total registration fee. **EVENT HELD RAIN OR SHINE.

FAX, Email or MAIL THE FORM BELOW WITH PAYMENT TO:
 Donna Walseth • 906 97th LANE NE • BLAINE, MN 55434 • dwalseth@esopexec.org
 763-785-4168 (fax) • 763-785-4122 (phone)

				Golfer	Mtg. Only
Name		Email			
Name		Email			
Name		Email			
Name		Email			
Company					
Address					
Phone					

Hotel Recommendation • No Room Block Reserved

Country Springs Hotel: 2810 Golf Road • Pewaukee, WI 53072 • 262-547-0201 • www.countryspringshotel.com

Wildwood Lodge: N14 W24121 Tower Place (I94 & WIS 164 – Exit 294) Pewaukee, WI • 262-506-2000 • <http://www.thewildwoodlodge.com/pewaukee/>