



**Tuesday,
March 13, 2012
at
Sprecher
Brewery**

701 West Glendale Avenue
Glendale, WI 53209
414-964-7837
www.sprecherbrewery.com

**SUPPORT THE CAUSE!
BRING A PRIZE FOR THE EMPLOYEE
OWNERSHIP FOUNDATION RAFFLE**

Conference Sponsors:



Enterprise Services, Inc.
262.646.6490
www.esi-enterprise.com



**Blue Ridge ESOP Associates
Prairie Capital Advisors**

8:30 - 9:00 am Registration and Continental Breakfast

9:00 - 9:30 am General Session and Chapter Awards Presentation: *Sherri McDermott, Chapter President & Officers*

Meet The 2012 Wisconsin ESOP Officers • Learn What's in Store for 2012 • Receive a Government Relations Update • Congratulate the 2012 Wisconsin ESOP Chapter Award Winners!

Two Track Conference Each time slot offers a choice of two sessions

Beer Garden Room: Communications/Culture OR **Rathskeller Room: Technical/Administrative**

9:40 - 10:40 a.m. Concurrent Breakout Sessions

Compensation Strategies - How it Drives Culture

Presenters: Mickey Maier, Alpha Investment Consulting Group; Anne Literski and Mark Hanson, Western Building Products

This session will start with a brief overview of compensation management and then look at how compensation can be integrated with the ESOP. We will look at the Western example and solicit examples from the group as to how their ESOP company manages compensation.

10:40 - 10:55 Taste and Toast Break

10:55 - 11:55 a.m.

ESOP Sampler: Communication and Culture Roundtables

Moderators: Wendy Schmidt, Principal Financial Group; Cindy Cerro, Total Water Treatment; Sherri McDermott & Rhonda Leader, Sentry Equipment Corp.; Wendy Yates, Wildeck, Inc.

Moderators will facilitate 4 roundtables focusing on various communication issues: Communication Barriers with Branch Locations; Hiring Employee Owners; Communication Ideas; and ESOP Committees. Here is your opportunity to learn from and exchange ideas with other ESOP companies.

12:00 - 1:00 pm Lunch & Networking

1:00 - 2:00 pm Advice from the Expert Brewmasters - Wisconsin Chapter Silver Award Winners

We've saved the best for last! Silver Award winning companies: Sentry Equipment Corp. and Western Building Products, have had their ESOP for more than 25 years. They will share their secrets, successes and failures in what has made them a winning ESOP company.

Creating a Winning Culture

Presenters: Mike Farrell, CEO, Sentry Equipment Corp.; Anne Literski, HR, Western Building Products

Developing a winning recipe takes time. Learn what it takes to develop and sustain a successful ESOP culture. Bring your questions...share your ideas.

2:00 - 2:15 pm Taste & Toast Break

2:15 - 3:30 pm

Repurchase Obligation for Investment Planning

Presenter: Aaron Juckett, ESOP Partners

This session will explore how the process of forecasting the future repurchase obligation can be an integral part of your ESOP and corporate strategic planning. For companies that do not have a formal strategic planning process, repurchase obligation forecasting is a great way to get started. This session will explore the various assumptions involved in the repurchase obligation forecasting process and how they impact the long-term strategic plan, corporate governance, and ownership culture. It will also review the interrelationship between stock valuation, distribution policy, and the repurchase obligation.

Common Administration Mistakes and How to Correct Them

Presenters: Renee Stadtmueller, Principal Financial Group; Scott Freund, Blue Ridge ESOP

Learn from others' mistakes! This session will discuss the most commonly made administration mistakes. We will also discuss correction programs available through the IRS that can be used to fix these errors.

Technical Tips, Tricks, and Advice

Presenters: Brian Baker, CFO, Sentry Equipment Corp.; Mark Hanson, CFO, Western Building Products

Seasoned ESOP company leaders will discuss issues faced on the technical side of their journey in creating a successful ESOP company; including corporate governance, repurchase obligation and succession planning.

ESOP Trivia & Employee Ownership Foundation Raffle

Impress your peers with your vast amounts of ESOP and other random knowledge! Win fabulous prizes! Join us along with Team Trivia of Wisconsin for an exciting trivia challenge. Teams will be formed to compete in a trivia challenge. This is your opportunity to show off your boundless knowledge of trivia, meet some new people, and maybe even learn a few things. Prizes will be awarded to the winning team. A fun time is sure to be had by all!

3:30 Conference Wrap Up and Close



REGISTRATION FORM
 Wisconsin ESOP Chapter Conference • March 13, 2012
Sprecher Brewery

701 West Glendale Avenue • Glendale, WI 53209
 414-964-7837 • www.sprecherbrewery.com

	<u>On or Before March 2, 2012</u>	<u>After March 2, 2012</u>
Members:	\$75 per person (1 st – 2 nd person per company) \$65 per person (3 rd + per company)	\$90 per person (1 st – 2 nd person per company) \$80 per person (3+ per company)
Non-Members:	\$120 per person	
At the Door:	\$140 per person	

Cancellation Deadline: March 1, 2012. You may send a substitute from your company at no additional charge.

To register and pay via credit card online, please select the link below:

<https://secure.esopassociation.org/secure/confreg/register.asp?confid=105>

To register and pay via check please complete the form below and mail to:

Donna Walseth • 906 97th Lane NE • Blaine, MN 55434 • 763-785-4122 (phone) • dwalseth@esopexec.org

Name			
Name			
Name			
Name			
Company			
Address			
Phone		Email	
Raffle Prize <small>(see Raffle Flyer for details)</small>			

Amount Enclosed: \$_____ (check made payable to **THE ESOP ASSOCIATION**)

THANK YOU!

Hotel Room Reservations for the evening of Monday, March 12, 2012 Hilton Milwaukee River • 4700 North Port Washington Rd • 414-962-6040 • double queen or king at \$91 Request: "WIESOP" Rate
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SUPPORT THE CAUSE!

BRING A PRIZE FOR THE EMPLOYEE OWNERSHIP FOUNDATION RAFFLE

See the flyer below for details ↓

Help The Wisconsin Chapter of The ESOP Association support the cause! Donate a prize for the Employee Ownership Foundation Raffle at the Conference on March 13, 2012.



Our goal is to raise \$1,250 for The Employee Ownership Foundation.
We can't do it without your help!

What you need to know...

- Raffle prizes should have a value of \$25 or more.
- Prize donations should be brought to the conference.
- Your company will be recognized as a contributor on signage at the event.
- Cash donations to purchase raffle prizes are also accepted.

**CONTACT: Donna Walseth • dwalseth@esopexec.org • 763-785-4122
by March 7 with your contribution.**

About the Foundation:

Your donation helps support numerous initiatives of the Employee Ownership Foundation.

<http://www.employeeownershipfoundation.org/>

The Employee Ownership Foundation Mission: To Promote Employee Ownership
Employee Ownership improves our competitiveness, our productivity and our free enterprise system. Employee Ownership should be a key economic force in America. The Employee Ownership Foundation's (EOF) primary purpose is to support programs that will increase the level of awareness and appreciation of the benefits of employee ownership and increase the number of employees who have access to this benefit.

This program can help your company's ESOP!

Each year the Employee Ownership Foundation honors the memory of Charles Edmunson, a leader of the employee ownership community, by awarding scholarships for the training of non-management employees of employee-owned companies. Charles believe that education was the cornerstone of his vision. The Charles R. Edmunson Scholarship helps to fulfill his goal by providing opportunities for employee owners to attend motivational and education programs that promote employee ownership and educate about the rights, responsibilities, risks and rewards of employee ownership.

Scholarship details are available at: <http://www.employeeownershipfoundation.org/edmunson.html>

SUPPORT THE CAUSE AND DONATE A PRIZE FOR THE RAFFLE!