



**The ESOP Association
Wisconsin Chapter**

ABOUT THE WI CHAPTER

The Wisconsin Chapter of the ESOP Association provides a local presence for WI ESOP companies and WI companies considering implementing an ESOP. TEA is a national organization, headquartered in Washington, DC, to educate and advocate employee ownership.

www.esopassociation.org

Certificate of Attendance

Participants will be eligible to receive a Certificate of Attendance, which may be helpful for continuing education or attendance verification purposes.

WI CHAPTER OFFICERS

Pam Klute, Trachte Building Systems

(608) 327-3156 FAX (608) 825-2606
pklute@trachte.com PRESIDENT

Sherri McDermott, Sentry Equipment

(262) 567-7256 FAX (262) 567-4523
sherri@sentry-equip.com VICE PRESIDENT

Betty Bollis, Amerequip

(920) 894-7063 FAX (920) 894-3799
bbollis@amerequip.com VICE PRESIDENT

Ken Williams, Ruekert & Mielke, Inc.

(262) 542-5734 FAX (262) 542-5631
kwilliams@ruekert-mielke.com VICE PRESIDENT

Sandy Paavola, Enterprise Services, Inc.

(262) 646-6490 FAX (262) 646-6499
spaavola@esi-enterprise.com TREASURER

Jean Blaney

(920) 830-4976 FAX (920) 830-4974
jean22@new.rr.com ADMINISTRATOR

DIRECTIONS TO

Country Springs Hotel

2810 Golf Rd, Pewaukee, WI 800-247-6640
www.countryspringshotel.com

From Downtown Milwaukee: Go west on I-94 (to Madison) approximately 20 miles to Hwy. T, turn right. Go 1/4 mile to Golf Rd, then left (west) on Golf Rd about 1 mile to the Country Springs Hotel.

From Gen. Mitchell Intl. Airport: Go west approximately 1 mile on airport freeway spur (119) to I-94 west. Go north on I-94 about 1-1/2 miles to 894 west bypass. Go west on 894 about 12 miles to I-94. Go west on I-94 (to Madison) about 12 miles to Hwy. T (Exit 293). Turn right at the end of the exit. Go 1/4 mile to Golf Road, then turn left on Golf Road and go west about 1 mile to the Country Springs Hotel.

From Madison: Go east on I-94 to Hwy. G (Exit 291). Go north on Hwy G to Golf Rd, then right on Golf Rd about 1/4 mile to the Country Springs.



**The ESOP Association
WI Chapter**

**Piecing
It All
Together**

April 15, 2008

8:00 am - 4:00 pm

Pewaukee, WI

Held at Country Springs Hotel

*Dress attire is casual.
Certificate of Attendance provided.*

MEETING SPONSORS:



Richards Benefits & Financial Services

*Special thanks to CHART Rehabilitation of Hawaii
for presenting their company story.*



PLATINUM SPONSORS:

Piecing It All Together ■ April 15 ■ Pewaukee, WI



- 8:00 am** **Registration** *(Continental breakfast served.)*
- 8:45 am** **Welcome / Opening Remarks**
- 9:00 am** **Putting It All Together** *Presented by Erica Roberts, Industrial Electric Wire & Cable*
- Piecing It All Together - CHART Rehab Company Story**
Presented by Frieda Takaki, CHART Rehabilitation of Hawaii, Inc.
Learn communication ideas for ESOP companies and why communication is so important.
- 10:00 am** **The ESOP Association: 30 Years of Advocating for Positive ESOP Law — Yesterday, Today, and Most Important, Tomorrow** *Presented by J. Michael Keeling, CAE, President, TEA*
This session will touch on the advocacy “brand” of the ESOP community developed over the past 30 years, but will focus on current challenges facing ESOPs in Washington, DC, especially S ESOPs, and set forth what the community needs to do to stop any cutbacks in ESOP law.
- 10:45 am** **Break**
- 11:00 am** **What To Expect On A Department of Labor (DOL) Audit**
Presented by Investigator Paul Windsor, Department of Labor
What is the DOL looking for in an ESOP audit? What defects or problems has the DOL been finding in ESOP audits? These issues will be addressed, allowing time for questions. This is a great time to get your DOL related questions answered.
- 11:45 am** **Lunch**
- 12:45 pm** **ESOP in Action Skit** *Presented by Employee Owners, Amerequip Corporation*
A 5-act play that depicts the Amerequip ESOP deal, shares allocated by ESOP loan payments, bank loan payments and the great reward to a retired employee-owner.
- 1:15 pm** **Communication Track: Sharing Communication Ideas Panel Discussion**
Panel presenters are Frieda Takaki, CHART Rehab of Hawaii, Inc., Sharon Hagenow, Amerequip Corporation, & Erica Roberts, Industrial Electric Wire & Cable
- Technical Track: Legislative, Regulatory, and Judicial Update**
Presented by J. Michael Keeling, CAE, TEA & Matt Flanary, Davis & Kuelthau, SC
- 2:00 pm** **Break**
- 2:15 pm** **Communication Track: ESOP Jargon** *Presented by Aaron Juckett, ESOP Insourcing LLC*
Learn terminology and acronyms that you will encounter throughout your ESOP experience.
- Technical Track: Helping Companies Prepare for a DOL Audit**
Presented by Matt Flanary, Davis & Kuelthau, SC
- 3:00 pm** **ESOP Employee Owner & ESOP Company of the Year - WI Awards**
- 3:15 pm** **Networking & Social Hour**

(Program schedule may be subject to change.)

MEETING REGISTRATION FORM

REGISTRATION FEE

TEA Members:

\$80 first attendee; \$65 each additional attendee from the same member company

Non-Member: \$125 per person

PAYMENT

Mail completed registration form along with your check payable to:

The ESOP Association WI Chapter
 PO Box 273
 Appleton, WI 54912-0273

DEADLINE: April 10, 2008

Company _____ Name _____ Name _____ Name _____	Fee: \$ _____ Fee: \$ _____ Fee: \$ _____	\$ _____ \$ _____ \$ _____ TOTAL ENCLOSED: \$ _____
---	---	---