



**Center for Cooperatives**  
UNIVERSITY OF WISCONSIN-MADISON

## **Business Succession and Retention: Employee Ownership Solutions**

**Thursday, April 20, 2017, 8:15 a.m. – 2:30 p.m.**

Location: Landmark Services Cooperative, 1401 Landmark Drive, Cottage Grove, WI 53527

### **8:15 a.m. – 9:00 a.m. Breakfast and Registration**

### **9:00 a.m. – 9:30 a.m. Welcome & Setting the Stage**

*Anne Reynolds, Executive Director, UW Center for Cooperatives*

### **9:30 a.m. – 10:15 a.m. What are ESOPs & Co-ops? Clarifying the Models and Dispelling Myths About Employee Ownership**

This session will explore the benefits and challenges of employee ownership and give attendees a better understanding of the different types of employee-owned businesses.

*Courtney Berner, Cooperative Development Specialist, UW Center for Cooperatives*

### **10:15 a.m. – 10:30 a.m. Break**

### **10:30 a.m. – 11:45 a.m. Becoming Employee Owned: Key Steps in the Conversion Process and Resources to Ease the Way**

This session will break down the conversion timeline and explain the key steps for undergoing a successful employee ownership conversion. Presenters will also give an overview of the available resources that can help with the transition process.

*Paul Karch, Partner, Husch Blackwell LLP*

*David Hammer, Executive Director, ICA Group*

### **11:45 p.m. – 12:30 p.m. Strategies for Capitalizing Conversion Deals**

This session will explore different strategies for capitalizing conversion deals, including outside financing and staged buyouts when most workers don't have the resources to pay for a business in cash.

*Mark Fick, Director of Lending, Shared Capital Cooperative*

### **12:30 p.m. – 1:15 p.m. Lunch & Networking**

### **1:15 p.m. – 2:30 p.m. Conversion in Action: Stories of Real Employee-Owned Business Transitions**

During this session, participants will hear directly from employees about the conversion of their business to employee ownership and how the change has affected their company's structure, culture, and bottom line.

*Dirk Maroske, President & CEO, Aztalan Engineering, Inc.*

*Karl Cumblad, Chief Operating Officer, Diversified Insurance Solutions*

*Josh Stolzenburg, President & Chief Executive Officer, North Wind Renewable Energy*

*Rob Peck, Sales Manager, North Wind Renewable Energy*

**OPTIONAL: 2:45 p.m. – 3:45 p.m.** One-on-one consultations with professionals who have supported employee ownership transitions. Pre-registration required.