

## Technical Assistance and Professional Service Providers for Employee Owned Businesses

Wisconsin has a robust network of technical assistance and professional service providers that support existing employee-owned businesses and groups interested in starting new employee-owned businesses. Below is a list of the resources and advisors.

### Cooperative Professional Advisors

#### ACCOUNTANTS

**Wegner and Associates LLC** - Madison, Baraboo, Janesville, and Pewaukee, WI  
Bruce Mayer, Partner, [bruce.mayer@wegnercpas.com](mailto:bruce.mayer@wegnercpas.com), (608) 442-1939 (Madison, WI)

**Clifton Allen Larson** - 13 Wisconsin locations  
[www.claconnect.com](http://www.claconnect.com)

#### LEGAL COUNSEL

**Herrick & Kasdorf** - Madison, WI  
David Sparer, Attorney, (608) 257-1369, [sparer@herricklaw.net](mailto:sparer@herricklaw.net)  
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**von Briesen & Roper, s.c.** - Milwaukee, WI  
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David Swanson, Attorney and Cooperative Law Practice Group Co-chair, [swanson.dave@dorsey.com](mailto:swanson.dave@dorsey.com),  
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**Lindquist & Vennum LLP** - Minneapolis, MN  
Michael Weaver, Attorney, [mweaver@lindquist.com](mailto:mweaver@lindquist.com), (612) 371-3987

**Stoel Rives LLP** - Minneapolis, MN  
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**Sarah Kaplan Law Office** - Chicago, IL  
Sarah Kaplan, Attorney, [sarah@sarahkaplanlaw.com](mailto:sarah@sarahkaplanlaw.com) (312) 469-0794

**Cross Law Firm** - Milwaukee, WI  
Nola J. Hitchcock Cross, Attorney, [njhcross@crosslawfirm.com](mailto:njhcross@crosslawfirm.com), (414) 224-0000

**Deborah Groban Olson, Attorney at Law** (ESOPS and cooperatives) - Grosse Pointe Park, MI  
Deborah Groban Olson, Attorney, [dgo@esoplw.com](mailto:dgo@esoplw.com), 313-331-7821

## NETWORKS AND TRADE ASSOCIATIONS

### **Cooperative Network** - Wisconsin and Minnesota

Cooperative Network is committed to building Wisconsin's and Minnesota's cooperative businesses. It provides government relations, education, marketing, and technical services to a wide variety of over 400 member-cooperatives. [www.cooperativenetwork.coop](http://www.cooperativenetwork.coop)

### **MadWorC** - Madison, WI

MadWorC is a network of worker cooperatives joining together to build a thriving, sustainable democratic economy in the Madison, Wisconsin, area. [www.madworc.org](http://www.madworc.org)

## TECHNICAL ASSISTANCE PROVIDERS

### **University of Wisconsin Center for Cooperatives** - Madison, WI

Established in 1962, the staff at the University of Wisconsin Center for Cooperatives pursues a research, educational, and outreach agenda that examines cooperative issues across multiple business and social sectors. The agenda encompasses all aspects of the cooperative business model, including development, finance, structure, and governance. [www.uwcc.wisc.edu](http://www.uwcc.wisc.edu)

Courtney Berner, Cooperative Development Specialist, [cberner@wisc.edu](mailto:cberner@wisc.edu), (608) 890-0966

### **Cooperative Development Services** - Wisconsin and Minnesota

Since 1985, Cooperative Development Services has helped existing cooperatives retain their vitality and plan for future growth opportunities. CDS also actively engages with new cooperatives and organizations operating in a cooperative manner to launch new business ventures and plan for long-term viability. [www.cdsus.coop](http://www.cdsus.coop)

Kevin Edberg, Executive Director, [kedberg@cdsus.coop](mailto:kedberg@cdsus.coop), 651-287-0184

**Cooperative Network** - (see listing in Networks and Trade Associations)

### **Democracy at Work Institute**

A nonprofit cooperative education and development project started by the US Federation of Worker Cooperatives in 2013, DAWI's goal is to ensure that the worker cooperative movement grows strategically and effectively, with a focus on developing cooperative solutions in economically and socially marginalized communities. [www.institute.usworker.coop](http://www.institute.usworker.coop)

### **U.S. Federation of Worker Cooperatives**

The United States Federation of Worker Cooperative is a national grassroots membership organization of and for worker cooperatives, democratic workplaces, and organizations that support the growth and development of worker cooperatives. Founded in 2004, USFWC provides support to their members and educational outreach to the public through conferences and events, resource referrals, and networking and training opportunities.

<http://www.usworker.coop/>

## **ESOP Professional Advisors**

### THIRD PARTY ADMINISTRATORS

#### **Blue Ridge ESOP Associates** - Locations nationwide

Chad Guzinski, Business Development, Midwest, 434-220-7945, cguzinski@BlueRidgeESOP.com

#### **ESOP Partners** - Appleton, WI

Aaron Juckett, President, 920-659-6002, ajuckett@esoppartners.com

#### **Principal Financial Group** - Appleton, WI

John Prodoehl, Consultant, 800-224-0144

### LEGAL COUNSEL

#### **Whyte Hirschboeck Dudek S.C.** - Madison, WI

Paul Karch, Attorney, 608-258-7138, pkarch@whdlaw.com

#### **DeWitt Ross & Stevens S.C.** - Madison and Milwaukee, WI, Minneapolis, MN

Brian Anderson, Attorney, 608-252-9340, bla@dewittross.com, (Madison, WI)

Timothy Stewart, Attorney, 262-754-2869, tls@dewittross.com (Brookfield, WI)

#### **Reinhart Boerner Van Dueren, S.C.** - Milwaukee, WI

Steven Huff, Attorney, 414-298-8126, shuff@reinhartlaw.com

### VALUATION

#### **Enterprise Services, Inc. (ESI)** - Delafield, WI

Scott D. Miller, Founder/President, (262) 646-6490, esi@esi-enterprise.com

Craig Olinger, Principal, (262) 646-6490, colinger@esi-enterprise.com

#### **C & M Valuations** - Waukesha, WI

Charles Rodieck, Vice President (262) 521-0411

#### **Wipli CPAs and Consultants** - Milwaukee, WI

Pamela Branshaw, Partner in Charge, (414) 431-9300

### TRUSTEES

#### **Professional Fiduciary Services** - Milwaukee, WI

J. Michael Maier, President, (414) 319-4100, maier@professional-fiduciary.com

## NETWORKS AND TRADE ASSOCIATIONS

### **Employee Ownership Foundation**

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. [www.employeeownershipfoundation.org](http://www.employeeownershipfoundation.org)

### **Employee-Owned S Corporations of America (ESCA)**

ESCA is the voice in Washington, DC that speaks exclusively for employee-owned S corporations ("S ESOPs"). Since 1998, ESCA's membership has grown to represent more than 140,000 employee-owners in virtually every state in the nation. [www.esca.us](http://www.esca.us)

### **ESOP Association – Wisconsin Chapter**

The Wisconsin Chapter provides the only regularly-scheduled opportunities in the State of Wisconsin for ESOP networking with other employee owners and ESOP professionals. As part of The ESOP Association, the Wisconsin Chapter has been actively assisting ESOP Companies grow in their technical knowledge and communications skills with their employee owners. [www.wiesop.org](http://www.wiesop.org)

### **National Center for Employee Ownership**

The National Center for Employee Ownership (NCEO) is a nonprofit membership and research organization that serves as the leading source of accurate, unbiased information on employee stock ownership plans (ESOPs), equity compensation plans, and ownership culture. [www.nceo.org](http://www.nceo.org)

## TECHNICAL ASSISTANCE PROVIDERS

### **Ohio Employee Ownership Center**

The Ohio Employee Ownership Center (OEOC) is a non-profit, university-based program established at Kent State University in 1987 to provide outreach, information, and preliminary technical assistance to Ohio employees and business owners interested in exploring employee ownership. The OEOC provides preliminary technical assistance to companies, community groups, and unions that are interested in exploring the possibility of employee ownership for their particular situation. [www.ocockent.org](http://www.ocockent.org)