

THURSDAY, MAY 11TH, 8AM UNTIL 4PM
**EMPLOYEE OWNERSHIP
CONFERENCE**
AGENDA at-a-glance



UNI / University of Northern Iowa
Business & Community Services

MORNING

8:00 a.m. **Sign-in & Breakfast**

- The wifi password is **jasper2008**

9:00 a.m. **Welcome**

- **Kick-off:** Randy Pilkington, University of Northern Iowa, Executive Director - Business & Community Services
- **Keynote Speaker:** Iowa Lieutenant Governor Adam Gregg
- **Guest Speaker:** Steve Storkan, Executive Director at the Employee Ownership Expansion Network

10:30 a.m. **Facilitated Networking:** Paul Kinghorn, Director of ADVANCE IOWA and CBGI

11:30 a.m. **Breakout Session**

- **Worker Cooperative Introduction, room 224**
Deb Giarusso, Senior Program Manager & Stacy Mullinex, Program Manager
Learn worker cooperative basics, its significance to smaller companies, and benefits provided to the company seller, employees, community and business itself.
- **ESOP Introduction, room 241**
Jerry Ripperger, National Vice President - ESOP Consulting Retirement & Income Solutions at Principal
Discover how ESOPs work, how it addresses business owner challenges, and the steps to get started.

12:30 p.m. **Lunch**

- **Resource Panel Discussion**
Moderator: Jeff Stein, producer and host of the "Iowa Business Report"
- **Panel members:** Paul Kinghorn, Jerry Ripperger, Nick Roby, Attorney & Clinical Professor of Law at Drake University
Duane Tolander, CPA/ABV, CVA, Managing Director at HDH Advisors, LLC
Professionals will share knowledge, information, resources, and insight regarding employee ownership available to all stakeholders.

AFTERNOON

2:15 p.m. **Breakout Session**

- **Engaging Employees in Employee Ownership Models, room 224**
Terry McGonegle, CFO at Wright Service Corp. (Retired)
Learn general principals to develop, implement, and monitor a plan that engages employees to work toward company goals.
- **Key Issues Likely Encountered in ESOPs during the First 10 Years, room 241**
Mike Mallaro, CEO at VGM Group, Inc.
Gain insight from an ESOP veteran to anticipate common issues as well as create a framework for mitigation.

3:15 p.m. **Wrap-up**

Celebration Jubilee with ADVANCE IOWA Team & the Advisory Council, Our Future Vision.

Sponsored by:

