Employee Ownership Strategies: Building High Performance, Inclusive Companies for the 21st Century

July 31, 2017

9:30 – 10:00 Registration and Continental Breakfast

10:00 – 10:45 Conference Welcome and Research Brief
Dr. William Castellano, Rutgers SMLR
Dr. Doug Kruse, Rutgers SMLR

- Mission of NJ/NY Center for Employee Ownership
- State of Employee Ownership in New Jersey and New York
- Current Research on Employee Ownership

11:00 – 11:45 ESOP’s as a Tool for Succession and Growth
Jim Steiker, Esq. SES Advisors

- What is an ESOP and How to Use as a Succession Strategy
- Legal and Transaction Structure Overview – The Role of Trustees

12:00 – 1:30 Lunch Buffet
Keynote Speaker – Loren Rodgers, Executive Director of NCEO
State of Employee Ownership

1:30 – 2:15 How is Value Determined: Establishing Value and The Appraisal Process
Terry Griswold, Empire Valuation

2:15 – 3:00 Case Study of a New Jersey ESOP
Richard Telesmanich, SVP/CAO Moretrench
Matt Hancock, Praxis Consulting Group

3:15 – 4:30 Broad Based Equity Sharing Plans
Michael Gonda, VP Corporate Communications & Public Affairs, Chobani
Debbi Marcus, Unilever

4:30 – 6:00 Concluding Remarks and Networking Reception

View the agenda for the 2nd Annual East Coast Compensation Symposium on August 1st.