



**Rutgers NJ/NY Center for Employee Ownership/Santa Clara CEP Conference
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.

