



Bringing together the worlds of Research, Policy, and Practice

8:00 a.m. – 9:00 a.m.	Registration and Breakfast	
9:00 a.m. – 9:45 a.m.	<p>Conference Welcome <i>William Castellano, PhD., Professor and Executive Director, Rutgers NJ/NY Center for Employee Ownership, Rutgers School of Management and Labor Relations</i></p> <p>Morning Keynote Session: "Understanding Support for Employee Ownership" <i>Douglas Kruse, PhD., Distinguished Professor and Associate Director, Rutgers Institute for the Study of Employee Ownership and Profit Sharing, Rutgers School of Management and Labor Relations</i></p>	
Session 1 10:00 a.m. – 10:45 a.m.	<p>ESOP Track: Ownership Succession and the ESOP Value Proposition <i>John Vitucci, Principal, Employee Benefit Services, PKF O'Connor Davies</i></p>	<p>Equity Compensation Track: Trends in Equity Compensation Programs <i>AmyLynn Flood, Partner, PwC</i> <i>Maria Robins, Vice President, Morgan Stanley</i></p>
Session 2 11:00 a.m. – 11:45 a.m.	<p>ESOP Track: ESOP Company Valuation and Financial Issues <i>Matthew Hricko, Managing Director, Valuation Advisory, Stout</i></p>	<p>Equity Compensation Track: The Power of Fractional Shares: Changing the Equation of Conventional Pay Practices <i>Mary Beth Anastasio, Senior Relationship Manager, Computershare</i> <i>Mark Boemio, VP, Regional Manager – Relationship Management, Computershare</i></p>
11:45 a.m. – 12:45 p.m.	Lunch	
Session 3 12:45 p.m. – 1:30 p.m.	<p>ESOP Track: Legal and Practical Aspects of an ESOP Transaction <i>James G. Steiker, President and CEO, SES ESOP Strategies</i></p>	<p>Equity Compensation Track: Top 10 Recommendations to Increase Equity Participation and Ownership <i>William Castellano, PhD., Professor and Executive Director, Rutgers NJ/NY Center for Employee Ownership, Rutgers School of Management and Labor Relations</i></p>
Session 4 1:45 p.m. – 2:30 p.m.	<p>ESOP Track: Building a Foundation for Performance through Communication, Engagement and Participation <i>Matt Hancock, Principal, Praxis Consulting Group</i></p>	<p>Equity Compensation Track: Equity Plan Value & Financial Wellness for the Changing Workplace <i>Nupur Bahal, Executive Director, UBS Workplace Wealth Services</i></p>
Session 5 2:45 p.m. – 3:45 p.m.	<p>ESOP Company Panel <i>Moderator: Richard Van Doel, PhD. President and CEO, Performance Validation, Inc., Indiana Center for Employee Ownership</i></p>	<p>Equity Compensation Company Panel <i>Moderator: James Mooney, Manager of Executive Compensation, PSEG</i></p>
Session 6 4:00 p.m. – 5:00 p.m.	<p>Closing Session Workforce Diversity and Use of Broad-based Stock Options: Effect on Firm Financial Performance, Employee Turnover and Employee Engagement <i>Joo Hun Han, PhD., Assistant Professor, Rutgers School of Management and Labor Relations</i></p> <p>Employee Ownership: The Big Future Issues <i>Joseph Blasi, PhD., Distinguished Professor, J. Robert Beyster Professor, Director, Institute for the Study of Employee Ownership and Profit Sharing, Rutgers School of Management and Labor Relations</i></p>	
5:00 p.m. – 6:30 p.m.	Reception	