

## About the Iowa-Nebraska ESOP Chapter

The Iowa-Nebraska Chapter of The ESOP Association provides a local presence for ESOP companies and companies considering implementing an ESOP in Iowa and Nebraska.

### ***Our Mission***

“To Educate and advocate employee ownership with emphasis on ESOPs.”

### ***Iowa-Nebraska Chapter Officers***

President

Rod Reinertson, Van Meter, Inc.

[rreinertson@vmind.com](mailto:rreinertson@vmind.com)

President-Elect

Gary Kaufman, CarePro Health Services, Inc.

[gkaufman@careprohs.com](mailto:gkaufman@careprohs.com)

Vice President

Hillary Hughes, Prairie Capital Advisors

[hhughes@prairiecap.com](mailto:hhughes@prairiecap.com)

Vice President

Terry McGonegle, Wright Tree Service

[tmcgonagle@wrighttree.com](mailto:tmcgonagle@wrighttree.com)

Vice President

Terri Piccolo, Farmers National Company

[tpiccolo@farmersnational.com](mailto:tpiccolo@farmersnational.com)

Vice President

Michelle Ueding, Kutak Rock LLP

[michelle.ueding@kutakrock.com](mailto:michelle.ueding@kutakrock.com)

Immediate Past President

Jim Winterscheid, Travel & Transport

[jwinterscheid@tandt.com](mailto:jwinterscheid@tandt.com)

Chapter Administrator

Donna Walseth, Walseth Management LLC

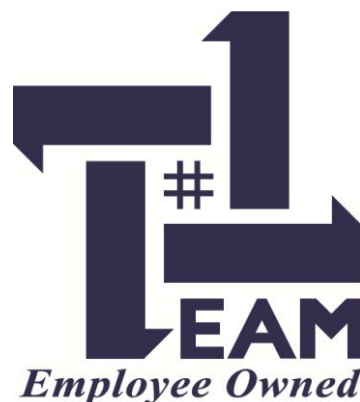
[dwalseth@esopexec.org](mailto:dwalseth@esopexec.org)

763-785-4122 - Phone

763-785-4168 - Fax

[www.iane-esop.org](http://www.iane-esop.org)

## Special Thanks to Event Host:



## TEAM Software, Inc.

407 S. 27th Avenue (FBG Building)

Omaha, NE 68131

[www.teamsoftware.com](http://www.teamsoftware.com)

### **Directions**

Conveniently located 1 block off I-480.

Take exit 2A, the Harney/Dodge exit.

Go right on Harney. FBG Building is on the right.

Park on Harney Street, or 27th Avenue.

### **The meeting room is on the third floor.**

NOTE: No elevator available. Contact Laura at Team Software if you require handicap assistance:  
[laura.coenen@teamsoftware.com](mailto:laura.coenen@teamsoftware.com); 402-348-3993



## Lunch & Learn Roundtable

\*\*\*\*\*

Friday,  
June 8, 2012

11:30 - 1:30 pm

*Hosted by:*  
**Team Software, Inc.**

407 S. 27th Avenue • Omaha, NE 68131

[www.teamsoftware.com](http://www.teamsoftware.com)

*A forum encouraging members of  
The Iowa-Nebraska Chapter of  
The ESOP Association  
to openly dialog.*



# Roundtable Luncheon Schedule • Friday, June 8, 2012

**Objective:** To provide a networking forum consisting of facilitated open discussion on issues important to ESOP Companies.

## About The Host Company:

**TEAM Software, Inc.** is a leading provider of software solutions and associated services for the building service and security industries. Based in Omaha, NE, **TEAM** offers a host of fully integrated solutions from operations, financial and workforce management to employee and customer self-service to time and attendance products designed to help customers profit from efficiency.

**TEAM** is proud to be an employee-owned company since 2007. Because each employee has a stake in the company, **TEAM's** staff is extremely motivated to make customer service its top priority, always. Each month, employee owners come together to discuss company strategy and review goals and key performance metrics. In addition, the ESOP Education Committee plans special team-building events and educational opportunities.

<b>11:30 am</b>	<b>Registration and Lunch</b>
<b>12:00 noon</b>	<b>Introductions and TEAM Overview</b>
<b>12:30 - 1:00 pm</b>	<b>Roundtable Discussions/Networking #1</b>
<b>1:00 - 1:30 pm</b>	<b>Roundtable Discussions/Networking #2</b>

**Attendees will have the opportunity to participate in 2 roundtable discussions.**

*Moderators will host discussions on the following topics:*

### Motivating/Educating Employees & Nurturing a Positive ESOP Company Culture

- How do you motivate your employees? Special events? Rewards? Perks?
- How do you educate employees about the ESOP and ESOP culture?
- What does it mean to have a positive ESOP culture?

### Challenges Facing Employee-Owned Companies

- Distribution Policy Design - discuss your distribution methods or bring your questions.
- How are ESOPs different and what challenges does that bring on?
- Discuss repurchase obligations/retirements/employee separation issues.
- What are some differences between 100% employee owned companies and ESOPs not yet fully employee owned?
- How do companies transition into an ESOP?

### Becoming Active in ESOP Legislation/The Political Side of ESOPs

- Is your company active in lobbying your congressional representatives?
- Share ways you have contributed to ESOP legislative issues.
- Discuss current/future legislative issues.
- Learn how to become active and reach out to your congressional representative.

### Celebrating ESOPs/ESOP Month Ideas

- How do you distribute employee statements? When? Who distributes the statements?
- What do you do to acknowledge ESOP Month?
- Share your ESOP Month success stories.

**Dress attire is casual.**

## Registration Form

- ESOP Association Members \$15/pp  
 Non-Members \$25/pp

Name \_\_\_\_\_

email \_\_\_\_\_

Name \_\_\_\_\_

email \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

**Total Enclosed:** \_\_\_\_\_  
*Checks Payable to The ESOP Association*

- Check                       MasterCard  
 Visa                             American Express

Credit Card No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Cardholder Name \_\_\_\_\_

**Return Form and Payment to:**  
**Donna Walseth**, Chapter Administrator  
906 97<sup>th</sup> Lane NE • Blaine, MN 55434  
Phone: 763-785-4122 • Fax: 763-785-4168  
E-mail: [dwalseth@esopexec.org](mailto:dwalseth@esopexec.org)