

1st Quarter, 2019

March 27, 2019

# Wisconsin ESOP Journal

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### About the Journal

- Read the articles within the Wisconsin ESOP Journal to see what the Wisconsin Chapter of The ESOP Association has been up to in the last few months, events to look forward to and other ESOP related news.

Mark your calendars and plan to attend the Wisconsin ESOP Summer Meeting. Attendees of this event last year enjoyed the venue so much that we are back at the Pyle Center on the University of Wisconsin Madison Campus alongside Lake Mendota on Monday, June 10th.

## Wisconsin Spring ESOP Conference Recap

*"Great sessions, worth attending" was the consistent message at the recent conference.*

The Wisconsin Chapter held its Spring Conference at the Wilderness Resort in Wisconsin Dells on March 15<sup>th</sup>. The event included a cocktail reception the night before and was considered a big success. The Chapter's strong attendance over the last 2 years continued as approximately 125 members and non-members attended the conference. In addition to a C-Suite roundtable session to start the morning, there were six great breakout sessions focusing on topics such as refinancing seller debt, the life cycle of an employee-owner, the process of ESOP companies being sold to third parties, and finding the "Why" in your company. The conference concluded with an inspiring presentation by Rich Chapman (Chartwell Financial Ad-

visory) about how great companies find their purpose and mission, and make sure all employees know it!



## Looking ahead to the Summer Meeting



You can look forward to great learning opportunities with breakout sessions covering communication and technical topics. In addition, we continue to have high demand for roundtable discussions, the Summer Meeting will have CEO, CFO, HR and ESOP Communications Committee roundtables, which will be offered throughout the day. Don't miss this great opportunity to network with other ESOP Companies.

## Welcome to our Newest Members!

[Fox Bros. Piggly Wiggly, Inc.](#)

Hartland, WI

[Leer, Inc.](#)

New Lisbon, WI

[Ramaker & Associates](#)

Sauk City, WI

*Find out what our members have to say about the Chapter on our [“Videos from Members”](#) page!*

## Wisconsin's Featured Member - MSA Professionals Services

*“A successful ESOP Culture is built on trust”*

Learn about MSA Professionals Services and their story of becoming a 100% S Corp. [Read their Story](#)

The Wisconsin Chapter invites you to share your Company's ESOP Story via our Featured Member webpage and quarterly Journal. **Contact us TODAY** to share your ESOP story and be our next Featured Member!



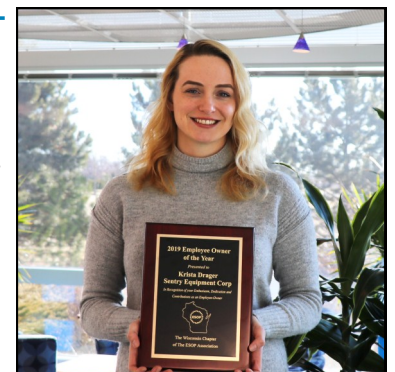
## Congratulations to Van Horn Automotive - Wisconsin Chapter ESOP Company of the Year



The Wisconsin Chapter recognized five finalists for ESOP Company of the Year during the 2019 Spring Conference in Wisconsin Dells earlier this month. Those finalists were: IEWC, New Berlin; Keller, Inc., Kaukauna; Priority Sign, Sheboygan; Sentry Equipment Corp, Oconomowoc and Van Horn Automotive Group, Plymouth. Van Horn Automotive took home the award and will be nominated by the Wisconsin Chapter for the National ESOP Company of the Year Award which will be announced during the Awards Banquet at the Annual ESOP Conference in Washington D.C. in May. [See here](#) what makes Van Horn Automotive a great ESOP Company! [Van Horn's Family Born. Employee Owned video.](#)

## Congratulations to Krista Drager, Sentry Equip Corp. - Wisconsin Chapter Employee Owner of the Year

Krista Drager, Sentry Equipment Corp in Oconomowoc, WI was recognized as the Wisconsin Chapter Employee Owner of the Year at the 2019 Spring Conference in Wisconsin Dells. In addition to Krista, four other finalists were recognized: Jennifer Gibson, VSI; Jacqui Grady, VSI; Bradley Todd, Wildeck and Jenna Van Der Sande, Priority Sign. Krista will be nominated by the Wisconsin Chapter for the National Employee Owner of the Year Award which will be announced during the Awards Banquet at the Annual ESOP Conference in Washington D.C. in May. [Check out the full submission](#) on what makes Krista Drager a great employee owner!





## Legislative Update

The ESOP Community is again supporting this Session of Congress a bipartisan bill to encourage retirement savings by fostering the growth of S Corporation ESOPs. Senate Bill 177, The Promotion and Expansion of Private Employee Ownership Act, would eliminate barriers that businesses and their owners currently face in establishing new S corporation ESOPs or expanding the employee-ownership stake in an S corporation. S. 177 currently has 26 Co-Sponsors, including Wisconsin Senator Baldwin.

## Capitol Hill Visits – Join Us on May 22!



During the ESOP Association Annual Conference in Washington, DC, in May, representatives of Wisconsin Chapter companies and advisors will visit Capitol Hill to meet with our Senators and Members of the House or their staff. We are generally well-received and have a lot of fun.

Please join us on Wednesday May 22!

## Congressional Visits to ESOP Companies in Wisconsin – Host One This Year!

One of the most useful things ESOP companies can do to support ESOPs in Congress is to host a visit by a member of Congress. Please plan a visit for 2019. The visits convey the value of ESOPs to all employees and give Members of Congress a feel for the passion employee-owners feel for their work, their company and their community.

If you would like some guidance or need some help setting up a visit, contact us!



## Want Help With Advocacy?

The ESOP Association has prepared a straightforward and useful advocacy kit for 2019 which you can download here: <https://www.esopassociation.org/advocacy/advocacy-kit>

The Government Relations Committee stands ready to assist. Please contact one of us if you are interested in inviting a Member of Congress and we will help. We have divided up the Wisconsin delegation as follows:

Member of Congress	WI ESOP Liaison	Member of Congress	WI ESOP Liaison
Congressional District 1 – Bryan Steil	Paul Karch	Congressional District 6 – Glenn Grothman	Scott Drake
Congressional District 2 – Mark Pocan	Paul Karch	Congressional District 7 – Sean Duffy	Scott Drake
Congressional District 3 – Ron Kind	Paul Karch	Congressional District 8 – Mike Gallagher	Scott Drake
Congressional District 4 – Gwen Moore	Craig Olinger	Senator Tammy Baldwin	Paul Karch
Congressional District 5 – Jim Sensenbrenner	Craig Olinger	Senator Ron Johnson	Craig Olinger



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## About Us

*The Wisconsin Chapter is one of the 18 regional chapters of The ESOP Association. Our Chapter is made up of numerous volunteers from ESOP Companies and Professional Service Providers in the great state of Wisconsin. Contact us, if you are interested in joining one of our committees in continuing to advocate and educate about Employee Ownership.*

*Feel free to contact us to get involved in the many events and activities seen throughout this newsletter: Wisconsin Chapter [Officers](#) and [Committee Members](#)*

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For more information on events, who we are, advocacy and more:

[www.esopassociation.org/chapters/wisconsin](http://www.esopassociation.org/chapters/wisconsin)

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Connect with us on [Twitter](#)

@ESOPWI

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## Upcoming Events

May 22 - 24th: [Annual ESOP Conference](#) in Washington, D.C.

June 10th: [Wisconsin Summer Meeting](#) at Pyle Center in Madison, WI

September 11-13th: [Midwest Regional ESOP Conference](#) at DoubleTree Hotel in Bloomington - Minneapolis South, MN

November 14-15th: [ESOP Technical Conference and Trade Show](#) at Paris Hotel in Las Vegas, NV

Additional Dates and locations to come for a Fall Roundtable Meeting, ESOP Onsite and/or Mini Conference. Please let us know if your company might be willing to host such an event.

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