

YOU'RE INVITED TO A PROFESSIONAL MEMBER WORKSHOP



Hosted by
**The ESOP Association
Minnesota/Dakotas
Chapter Membership
Committee**

ESOP Association Professionals Forum – A Deep Dive

A group of panelists who attended the Professionals Forum in New Orleans will take a deeper dive on hot topics in the ESOP industry including:

- Auditors role in reviewing valuations
- Disclosures of ESOP valuations
- Refinancing ESOP loans as last resort to managing targeted benefit levels
- ESOP purchase transactions: Trustee protections including earnouts and clawbacks – What's new?

Panelists

- Jim Vogl, Barna, Guzy & Steffen
- Dan Markowitz, Boulay
- Tom Murphy, Bremer
- Matt Schubring, Chartwell Financial Advisory
- *Moderator:* Jason Wellman, ESOP Partners

Date: April 25, 2019

Time: 7:30-9 AM - *A light breakfast will be served*

Location: Walman Optical | 801 12th Avenue North, Minneapolis, MN 55411

Cost: Complimentary

Please RSVP to Sue Crockett by April 19, 2019

scrockett@esopexec.org | 612-872-4375