

## Monday June 4, 2018

6:00 – 9:00 pm	Meet and Greet Welcome Reception (Fantasyland Hotel West Edmonton Mall)
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## Tuesday June 5, 2018

7:30 – 8:15 am	Registration and Breakfast (Fantasyland Hotel West Edmonton Mall)
8:15 am	Introductions / Welcome
8:30 am	“Keeping Banff in Banff” – ESOP as a Succession Plan” – Gord Lozeman and Shawn Birch, Banff Lodging Co. President & CEO and VP Finance & Projects
9:15 am	“International Employee Ownership Panel” – Ramona Rodriguez-Brooks, NCEO Outreach and Membership Coordinator (USA); David Hildebrandt, International Association for Financial Participation (IAFP); Robert Postlethwaite, Postlethwaite Employee Ownership Lawyers (UK)
10:00 am	Break and Networking
10:30 am	“Tax Changes and Your ESOP” – Richard Gil, Mowbrey Gil LLP Partner
11:15 am (concurrent– Room 6)	“ESOPs 101: The Why’s and How’s” – Dan Ohler, ESOP Builders Inc. Employee Ownership Specialist
11:15 am (concurrent– Room 7)	“Improve Your Mental Abilities for Greater Success” – Ramy Taraboulsi, VeritableSoft Innovations CEO
12:00 pm	Lunch and Networking

## Tuesday June 5, 2018

1:00 pm	“Building and Managing Boards in an ESOP Company” – Tom Redl, CHANDOS Construction Ltd. CEO
1:45 pm	“Utilizing RRSPs and TFSAs: Trustee, Tax, and Legal Compliance Panel” – Jay Campbell, Odyssey Trust Company President, Ed Heakes, Dale & Lessmann LLP Partner; and, Dean Psarras, Dale & Lessmann Partner
2:30 pm	Break and Networking
3:00 pm	“Engaging Millennials: How to Attract ESOP Participants” – Stefan Wiesen, Intrigue Media Solutions Inc. Co-Owner and Dean Ell, iQmetrix Corporate Controller & ESOP Administrator
3:45 pm	“The PCL Story” – Gordon Panas, PCL Construction Chief Financial Officer
4:30 pm	Wrap up and Kick off Scavenger Hunt
4:30 – 5:30 pm	Cocktails and Networking
5:30 pm – 8:30 pm	Scavenger Hunt and Dinner
8:30 pm – 10:30 pm	Desserts, Cocktails, Scavenger Hunt Results, Prizes, and Networking

## Wednesday June 6, 2018

7:30 am	Breakfast (Fantasyland Hotel West Edmonton Mall)
8:00 am	“ESOP Problems and Solutions Panel” – Dean Ell, iQmetrix Corporate Controller & ESOP Administrator; Patrick O’Brien, Metcalf Archaeological Consultants, Inc. Senior Staff Archaeologist; and, Perry Phillips, ESOP Builders Inc. President
8:45 am (concurrent–Room 7)	“Exit Planning: The True Cost of Owner Dependence” – Vincent Côté, Hero’s Guide Inc. Director
8:45 am (concurrent-Room 6)	“A Practical Guide to Business Valuation: Debunking the Valuation Myth “It’s 5 Times EBITDA.....Right?”” – Andrew Dey, Mowbrey Gil Advisory Services Inc. President
9:30 am	“Ask the Expert” Roundtable sessions
10:05 am	Break and Networking
10:35 am	“Ask the Expert” Roundtable sessions
11:15 am	“Celebrating Canadian Employee Ownership at Your Company” – Dan Ohler, ESOP Builders Inc. Employee Ownership Specialist and Ramona Rodriguez-Brooks, NCEO Outreach and Membership Coordinator
11:45 am	Closing Ceremony – Patrick O’Brien, 2018 Conference Chair
12:05 pm	Boxed lunch available for all attendees
12:30 pm – 2:30 pm	ESOP Association Canada Annual General Meeting (for existing Association members and anyone interested in getting more involved in the ESOP Association and the future of ESOPs in Canada)