

Monday June 3, 2019

4.30 – 5.45 pm	“ESOPs 101: The Why’s and How’s” Dan Ohler, ESOP Builders Inc. Employee Ownership Specialist
6:00 – 9:00 pm	Meet and Greet Welcome Reception Novotel Toronto North York Hotel

Tuesday June 4, 2019

7:30 – 8:15 am	Registration, Breakfast and Networking Novotel Toronto North York Hotel
8:15 am	Introductions / Welcome
8:30 am	“Selkirk Signs ESOP Story” Kris Reimer, Selkirk Signs Vice President of Sales and Marketing
9:15 am	“Key Valuation, Legal and Tax Issues for Pre and Early ESOPs” Andrew Dey, Mowbrey Gil Advisory Services Inc. President Dean Psarras, Dale & Lessmann LLP Partner Perry Phillips, ESOP Builders Inc. President
10:00 am	Break and Networking
10:30 am	“Artificial Intelligence and its Impact on Employees” Ramy Taraboulsi, VeritableSoft Innovations Managing Director and CEO
11:15 am	“KeyLeaf – From Government Funded to Employee Owned Entrepreneur (and Beyond)” Karen Letourneau, KeyLeaf Director, Global Business Process
12:00 pm	Lunch and Networking

Tuesday June 4, 2019

1:00 pm	<p>“Transitioning from a Major Engineering Company to an Independent, Employee Owned Consulting Practice” Graham G. Clow, Roscoe Postle Associates Chairman of the Board Perry Phillips, ESOP Builders Inc. President</p>
1:45 pm	<p>“Talent Optimization.... Predictive Analytics for the Millennial and others from Hire to Inspire” David Lahey, Predictive Success Corporation Founder & CEO</p>
2:30 pm	<p>Break and Networking</p>
3:00 pm	<p>“Global Best Practices for Employee Financial Participation and Challenges for Small, Medium and Large Enterprises” David A. Hildebrandt, International Association for Financial Participation (IAFP) President</p>
3:45 pm	<p>“Ask the Expert” Roundtable sessions</p>
4:30 pm	<p>Wrap-up</p>
4:30 – 5:30 pm	<p>Cocktails and Networking Novotel Toronto North York Hotel</p>
5:30 pm – 7:00 pm	<p>Dinner and Networking Novotel Toronto North York Hotel</p>
7:00 pm – 10:30 pm	<p>Special Performance by Wayne Lee, award winning corporate hypnotist and performance coach Novotel Toronto North York Hotel</p>

Wednesday June 5, 2019

8:00 am	<p>Breakfast and Networking Novotel Toronto North York Hotel</p>
8:30 am	<p>“Data and employee ownership: Scientific knowledge, it IS your business” Jung ook Kim, Rutgers University, SMLR (School of Management and Labor Relations) Louis O. Kelso Research Fellow, PhD Candidate</p>
9:00 am	<p>“Valuation, Legal & Tax Surprises for Established ESOPs” Melanie Russell, Kalex Valuations President and Founder Dean Psarras, Dale & Lessmann LLP Partner Ed Heakes, Dale & Lessmann LLP Partner</p>
9.45 am	<p>Break and Networking</p>
10:15 am	<p>“The one thing you need to get right for Millennials before creating an ESOP” Vanessa McQuade and Seth Partridge, Intrigue Media Solutions Inc. Client Service & Online Marketing Specialist, and, Systems Integrator</p>
11:00 am	<p>“Ask the Expert” Roundtable sessions</p>
11:45 am – 12.45pm	<p>Lunch and Networking</p>
12.45 pm	<p>“Broad-based Employee Ownership at Peavey Industries: Redefining the Retail Experience” Doug Anderson, Peavey Industries LP President & CEO</p>
1.30 pm	<p>“How to Engage Employee Participation and Celebrate Your ESOP: An Interactive Session” Dean Ell, iQmetrix Corporate Controller & ESOP Administrator Ramona Rodriguez-Brooks, NCEO Outreach and Membership Coordinator</p>
2:15 pm – 2:30 pm	<p>Closing Ceremony Paul Maarschalk, Maarschalk Valuations Inc. President and 2019 Conference Chair</p>
2.30 pm – 4.00 pm	<p>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)</p>