

The Power of Options: The 2019 Wisconsin EPI Owners Forum

Regardless of what life cycle stage your company is in, being prepared for inevitable transitions makes good business sense. Your aspirations and hard work have carried you far in life and contributed greatly to the creation of considerable wealth, much of which is concentrated in your business. However, when the time comes to consider an ownership transfer, it's up to you if it will be on your terms or the terms of others.

When you know more about what your options are, you have the ability to adjust how you operate. You think and act differently because knowing what opportunities are available to you gives you the insight needed to make the best decisions for you and your business. There is power and confidence in knowing the choices you have before you.

This half-day, interactive educational event for business owners and their key partners featured an opening keynote: ***The Power of Options***, from Sean Hutchinson, CEPA, Partner, SVA Value Accelerators. Attendees also heard from local experts and leaders who provided participants with the information needed to both create additional value and exit their business in the best way possible.

Topics & Speakers

Employee Stock Ownership Plans (ESOPs) - Speaker: Rebecca Greene, Shareholder, Reinhart Boerner Van Deuren s.c.; Facilitator: Eric Hagemeyer, Shareholder, Reinhart Boerner Van Deuren s.c.

Internal Succession (Management or Family) – Speaker: Martha Sullivan, Partner, Succession Planning Practice Leader, Honkamp Krueger & Co., P.C.; Facilitator: Leesa Gilliam, Vice President, Senior Relationship Strategist, PNC Bank

Private Equity – Speaker: David Bartelme, Managing director, Borgman Capital, LLC; Facilitator: Frank Bremser, Partner, Business Transitions Practice Leader, Honkamp Krueger & Co., P.C.,

Strategic Third-Party Buyer – Speaker: Ed Krajcir, Sunbelt Business Advisors, Managing Partner; Facilitator: Erik Owen, Founder & Owner, Oak Hill Business Partners

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Presentation Materials

[EPI Owners Forum](#)

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