

**Employee Stock Ownership Plans
&
Equity Compensation**

October 26, 2018



Bringing together the worlds of Research, Policy, and Practice

8:30 a.m. – 9:30 a.m.	Registration and Breakfast	
9:30 a.m. – 10:30 a.m.	<p>Conference Welcome General Session: Thinking Strategically about Your Equity Compensation Program</p> <p><i>William Castellano, Ph.D.</i> <i>Department Chair/Professor</i> <i>Executive Director, Rutgers NJ/NY Center for Employee Ownership</i> <i>Rutgers School of Management and Labor Relations</i></p>	
<p>Session 1 10:45 a.m. – 11:45 a.m.</p>	<p>ESOP Track Business succession, the ESOP Value Proposition, and Alternatives</p> <p><i>John Vitucci, Principal,</i> <i>Employee Benefit Services,</i> <i>PKF O'Connor Davies</i></p>	<p>Equity Compensation Track Trends in Equity Compensation Programs</p> <p><i>Sharmon Priaulx, Managing Director,</i> <i>PricewaterhouseCoopers,</i> <i>People and Organization</i> <i>and</i> <i>Maria Robins, Vice President,</i> <i>Morgan Stanley</i></p>
11:45 a.m. – 12:45 p.m.	Lunch	
<p>Session 2 1:00 p.m. – 2:00 p.m.</p>	<p>ESOP Track Valuation and Financial Fairness Considerations in ESOP Transactions</p> <p><i>Aziz El-Tahch, Managing Director,</i> <i>Valuation Advisory,</i> <i>Stout Risius Ross, LLC</i></p>	<p>Equity Compensation Track Offering an Employee Stock Purchase Plan Your Participants Will Value</p> <p><i>Charles Russo, Vice President,</i> <i>Regional Manager,</i> <i>Computershare</i></p>
<p>Session 3 2:15 p.m. – 3:15 p.m.</p>	<p>ESOP Track Legal and Fiduciary Responsibilities</p> <p><i>James G. Steiker, President and CEO,</i> <i>SES ESOP Strategies</i></p>	<p>Equity Compensation Track Financial Wellness and Equity Plan Value</p> <p><i>Nupur Bahal, Executive Director,</i> <i>Workplace Financial Wellness,</i> <i>UBS</i></p>
<p>Session 4 3:30 p.m. – 4:30 p.m.</p>	<p>Company Panel - ESOP</p> <p>Menke & Associates, Inc. <i>Phil DeDominicis, Managing Director</i></p> <p>Turtle & Hughes, Inc. <i>Chris Rausch, Chief Financial Officer</i></p> <p>Visual Graphic Systems Inc. <i>Paul Theodore, President and CEO</i></p>	<p>Company Panel – Equity Compensation</p> <p>Campbell Soup Company <i>Dan Ferretti, Manager,</i> <i>Compensation Operations</i></p> <p>Johnson & Johnson <i>Jane E. Poli, Finance Manager,</i> <i>Equity Compensation Resources</i></p> <p>Public Service Enterprise Group (PSEG) <i>James Mooney, Manager Compensation</i></p>
4:30 p.m. – 5:30 p.m.	<p>Closing Presentations</p> <p><i>Chris Davis, Chief Financial Officer, Managed by Q Inc.</i> <i>Hanna Mori, Deputy State Director, U.S. Senator Cory Booker</i></p>	
5:30 p.m. – 6:30 p.m.	Networking Reception	