Central Indiana Chapter RMA Presents: ESOPs

When: Monday, August 28, 2017; 2:30 PM – 4:30 PM (Registration begins 2:15 PM)
Where: PNC; 101 W. Washington Street, Indianapolis; Training Room B, 3rd Floor (East Tower)

Daniel M. Rosio: ASA, MBA, *Partner-Katz, Sapper, & Miller*

Dan Rosio is the partner-in-charge of Katz, Sapper & Miller's Valuation Services Group. Dan's background includes providing valuation, litigation and business advisory services to a wide variety of clients. He has extensive experience in project management, financial statement analysis, financial modeling, report writing and other due diligence services related to business valuation services. Dan has completed hundreds of valuation and litigation engagements in his career. Dan is an Accredited Senior Appraiser of the American Society of Appraisers and a member of the Indiana Chapter. Additionally, he is a member of The ESOP Association and the Estate Planning Council of Indianapolis.

Tony Kaufman: Vice President; *Relationship Manager-First Merchant's Bank*

Mr. Kaufman joined First Merchants Bank in 2014 after spending 9 years at a larger, regional Bank in central Indiana. Tony has experience in a wide range of industries throughout the Midwest and has also developed unique expertise in advising and lending to ESOP owned companies as well. Mr. Kaufman earned his Bachelors degree in Economics from DePauw University and a Masters in Entrepreneurship and Finance from the Indiana University Kelley School of Business. He is a member of the Young Professionals of Central Indiana (YPCI), Association for Corporate Growth (ACG), The National Center for Employee Ownership (NCEO) and the ESOP Association.

TOPICS TO BE DISCUSSED:

- ESOP "101" - Overview
- Underwriting Considerations
- Transaction Overview & Current Trends
- Accounting for ESOPs

Registrant Information *(Deadline Wednesday; August 23,, 2017)*:

Pay with Credit Card and Register Online by going to the following hyperlink: ESOPs

Or, Register with check by mailing this completed form below along with your check for $25 payable to:
The Central Indiana Chapter of RMA; Attn Sam Roberson; C/O First Merchants Bank; 10333 North Meridian Street, Suite 300; Indianapolis, IN 46290

Name _____ Position _____ Institution _____

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Certified for 2.0 Hours RMA CRC Continuing Education Credit
Any questions, Email Sam Roberson at: sroberson@firstmerchants.com