CHAPTER MEETING

TUESDAY
FEBRUARY 17, 2015

LOCATION
Rock Garden Conference Center
1951 Bond Street
Green Bay, WI 54303
Click Here for Map

TIME
2:00 PM – 4:05 PM
Professional Development Session

4:15 PM – 5:30 PM
Keynote Speaker Presentation

5:30 PM – 5:45 PM
Business Meeting & Recognition of Patti Ayala's Service to FEI

5:45 PM – 7:30 PM
Social Period & Buffet Style Dinner

For this event the social period and dinner will be combined. We will have pub tables for those who wish to stand and enjoy a beverage and the buffet, as well as traditional dinner tables for those who prefer to be seated with their colleagues.

REGISTER BY
February 10, 2015

Click Here to Register

CPE CREDITS
Professional Development Session Qualifies for 2.5 Credits.
Keynote Speaker Presentation Qualifies for 1.5 Credits

CANCELLATION POLICY
Please send cancellations to mwcomfoxcities@gmail.com no later than 5:00 PM Tuesday, February 10, 2015.

FEES
This meeting is free for FEI members, strategic partners and prospective member guests.

Keynote Speaker Presentation

Jeffrey A. Joerres

Executive Chairman, ManpowerGroup
Topic: Human Age/Human Capital

Jeffrey A. Joerres assumed the role of ManpowerGroup Executive Chairman on May 1, 2014 after 15 years as CEO. Having joined the organization in 1993, Joerres served as Vice President of Marketing and Senior Vice President of European Operations and Global Account Management. In 1999, he was named CEO, and in 2001, Chairman of the Board.

Joerres led a transformation of ManpowerGroup's business strategy, adding new business lines that have expanded the company's ability to help clients and candidates win in the changing world of work.

Under Joerres' tenure, ManpowerGroup experienced rapid growth, expanding the footprint of the organization to 3,100 offices across 80 countries and territories.

ManpowerGroup has climbed the ranks of the Fortune 500 American companies list, moving from 183 to 144 in 2014. ManpowerGroup was also named to the Ethisphere Institute's list of the World's Most Ethical Companies, the only company in the industry to be recognized for four consecutive years.

In addition to the ManpowerGroup board, Joerres is past Chairman and current member of the Federal Reserve Bank of Chicago board of directors, serves on the boards of Johnson Controls, the US Council for International Business (USCIB), and the Committee for Economic Development (CED), and is chair of the Future Workforce Committee of the Greater Milwaukee Committee. Joerres has a bachelor's degree from Marquette University's College of Business Administration.

Professional Development Session

A Panel Discussion Presented by Associated Financial Group

Topic: The Future of Executive Compensation: An Essential Conversation

With the advent of many market reforms and compliance obligations stemming from the Affordable Care Act, employers are scrambling to be at the forefront of this paradigm shift. One specific area of change is the executive compensation model. The popularity of executive-only health plans is receding, partly due to specific ACA reforms and partly due a changing insurance industry. Contributing to this movement are population factors and a shift in employment values, as the baby-boomer generation increasingly retires and the age of those employees filling key positions decreases.

(continued on following page)

Professional Development Session (continued)

Please join us for an informative and spirited discussion about the future of executive compensation and benefits. Our panel of experts will approach this topic from all angles, focusing on health benefits, key-person insurance, retirement planning and personal trust services. Through interviews and case studies, we'll discuss why employers of all sizes and industries continue to place importance on using specialty executive compensation to attract and retain key employees. Our experts will also showcase examples of employers who are leading the way in finding alternatives to traditional compensation models that are both cost-effective and attractive.

Associated Bank Panel Discussion Moderator

Bret A. McKitrick, J.D.

Vice President, Human Resources Consultant

Bret McKitrick has practiced law exclusively in employee benefits and human resources, representing both private and public sector employers of all sizes. Through training and one-to-one counseling, Bret works with HR professionals to ensure they have a clear understanding of the rules governing all aspects of human resources. He helps management teams develop strategies to streamline HR functions and provide employee benefits that are both attractive and cost-effective. He works with employers to maintain compliance of health and wellness benefit packages under state and federal guidelines, including rules of taxation and Health Care Reform. Bret holds a Bachelor of Science in Economics from the University of Kentucky and a Juris Doctor from the University of Pittsburgh School of Law. He is licensed to practice law in Wisconsin and West Virginia. Bret is a frequent speaker in areas of: PPACA, ERISA, COBRA, HIPAA, ADA, FMLA, FLSA, 401(k)/403(b) compliance, payroll, and federal taxation.

Associated Bank Panel Discussion Presenters

Jeff Bartosic, CLU, ChFC

Vice President, Advanced Planning Specialist

Jeff Bartosic has been in the financial services industry for over 40 years. He uses individual life, disability and long-term care insurance as tools to support trust, commercial lending, employee benefits and private banking customers of Associated Bank. Jeff's wide range of experience allows him to expertly assess clients' needs and develop the most effective solutions. Jeff has been with Associated Financial Group since 1989.

Professional accomplishments

Finance, University of Wisconsin - Madison, Madison, WIM.S., American College

CLU – Chartered Life Underwriter

ChFC – Chartered Financial Consultant

Past president, Northeastern Wisconsin CLU

Member and past president, Fox Valley Estate Planning Council

Continuing education, over 30 hours a year

Mardi Burns, CHC

Senior Vice President, Senior Benefits Consultant

Mardi Burns has over 30 years of experience in employee benefits, with a focus on assisting medium to large employers design, implement and manage their benefit plans. Her specialties include multi-sited self-funded plans, strategic benefit planning facilitation, public employer plans and integrating the benefit strategy with engagement and wellness strategies.

She also provides renewal and benefit analysis, union negotiation consulting, employee education, healthcare reform analysis and planning and wellness consultation, while keeping an eye on strategic recommendations. Mardi has been involved in the design and implementation of several employer on-site and near-site health clinics including facilitating cooperative multi-employer clinics. Additionally, Mardi is a frequent speaker on employee benefits costs and solutions. Mardi's goal is to be an integral part of the client's team, using her background to develop creative, proactive strategic benefit plan solutions.

Mardi joined Associated Financial Group in 1987 as a consultant and in 1993 was promoted to senior consultant. Previously, Mardi spent nine years with a major insurance provider working with national accounts.

Professional accomplishments

Business Administration, University of Wisconsin – Madison, Madison, WI
M.B.A., University of Wisconsin – Oshkosh School of Business
CHC – Certified Health Consultant

Robert Riolo

Senior Vice President, Regional Trust Manager

Bob Riolo is senior vice president, regional trust manager at Associated Private Client Services. He joined Associated in 2001 as vice president, personal trust manager, at which time his responsibilities included oversight of all personal trust administration services including a total client portfolio of more than $1 billion.

Today he has responsibility for leading Associated's Private Client Services group, which has assets of $1.48 billion and $11 million in annual revenue, as well as implementation of the client delivery model for the Fox Valley and Lake Shore Regions.

Bob's more than 25 years of banking industry experience includes roles of increasing responsibility at Superior National Bank & Trust Co. in Hancock, MI, where he first worked as business development officer, advancing to investment manager, and later to vice president of trust, with responsibility for overall trust administration, operations and strategic planning, advancing the bank's trust assets from $75 to $190 million.

Bob is an accredited Fiduciary Investment Manager and a graduate of the Michigan Bankers Trust School program. He has served on the national board of directors and as local chapter president of Little Brothers – Friends of the Elderly. His other community service includes board membership on the Scholarships, Inc. Advisory Board and local school board president.

Mike Shlensky

Senior Vice President, Director of Retirement Plan Services

Mike Shlensky is Senior Vice President, Director of Retirement Plan Services for Associated Institutional Trust Services. He is responsible for leading, developing, executing and managing the unit's business plan, including product management, sales and client service delivery processes. He has been a member of the Associated team since 2013, and brings more than 30 years of retirement and institutional trust services experience to his clients.

Mike holds a Bachelor of Business Administration degree in finance, investments and banking from the University of Wisconsin – Madison. He is also a graduate from the Bank Administration Institute with a Trust and Financial Service major.

Active in the community, Mike is a board member of the Congregation Shalom and the business mid-management committee at Milwaukee Area Technical College. He is an affiliate member of the American Society of Pension Professionals and Actuaries and the Wisconsin Retirement Plan Professionals, Limited.

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February 17, 2015 Chapter Meeting: **Instructional Method:** Group-live **Experience Level:** Basic **Prerequisites / Advance Preparation:** None **Field of Study:** Professional Development Session = Specialized Knowledge & Applications; Keynote Speaker Session = Economics **Recommended CPE Credits:** Professional Development Session = 2.5; Keynote Speaker = 1.5.

For FEI CPE credits, one credit hour equals 50 minutes according to NASBA guidelines. Some state boards may differ on how many minutes constitute a credit hour. Contact your state board for more information. For more information regarding administrative policies such as complaint and refund, please contact Michelle Weiss, Chapter Administrator: mwcomfoxcities@gmail.com.