



CHAPTER MEETING

TUESDAY
April 21, 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 & Student
Achievement Awards

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

REGISTER BY

April 14, 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 on
Friday, April 17, 2015.

FEES

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

Keynote Speaker Presentation



- Kate Burgess -

CEO, Elevate97

**Topic: Transformation Through Rapid
Growth: The Elevate97 Story**

Elevate97 shows off brands. Anywhere. Anyhow. And that's just the way Kate likes it. As CEO and owner, Kate describes what her company does by saying, "We elevate brands. Think little boxes to big buildings. We show off world renowned retail brands like TaylorMade, Nautica, Pandora Jewelry and the Green Bay Packers."

What started in a garage is now a 190,000 square foot facility of innovation and brand elevation in Green Bay, Wisconsin. Elevate97 partners with over 200 clients and produces and distributes over 40 million pieces of marketing magic every year.

Kate drives growth and commitment to partners through her own deep belief in elevating those around her—and having a darn good time along the way! She and her company, formally known as Fulfillnet, have come a long way since she and her husband, Tom, pushed a borrowed hotel cart filled with marketing ideas up and down Madison Avenue. "It's the relationship we have with our partners from Madison Avenue to right here in Green Bay that has grown the company," she says. And that growth has resulted in revenues increasing over 450%, with a 250% increase last year alone.

Kate brings together aspects needed to elevate world renowned brands in homes, businesses and storefronts around the globe. The company started in the fulfillment, warehousing and pick-pack ship industry but has significantly expanded. This expansion, driven by her desire to meet the full needs of her clients, led her to purchase a local printing company that now allows her organization to offer traditional and digital printing and large format environmental graphics that bring brands to life—sometimes larger than life!

And if the service doesn't exist yet, Kate asks how her company can create a way to fill her clients' unmet needs. That kind of innovation led to the creation of a proprietary software called ShopDev that manages the ordering and distribution of marketing assets for retail giants like Phillip-Van Heusen and its brands like Calvin Klein.

Understanding the importance of community engagement, Kate has established three pillars for her company that she asks all employees to uphold: fun, innovation and personal responsibility. The pillar of personal responsibility speaks to her desire for each person to work toward improving their teams, their company, and their community. To that end, the company participates in Habitat builds, clothing drives and fundraisers for those in need. The company is also a frequent sponsor of such events as the St. Norbert College Girls in Leadership (GLAD) Camp and donates time and materials for events such as the Business in Ethics Awards hosted by the American Foundation of Counseling Services, or enrollment initiatives for local schools.

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Keynote Speaker Presentation (Continued)

The company's growth and transformation also led to a company rebrand and name change. Kate will share how the focus on the company's brand started by listening to employees—or as she says, her internal partners and brand ambassadors.

Previously, Kate worked for Anchor Food Products (now part of McCain Foods) where she served as Vice President of Human Resources. Before that, she held roles as the Regional Sales Manager, Director of Marketing and National Sales Trainer. It was as a sales trainer, traveling across the country in a customized semi-truck with her husband launching products at retailers that a big idea struck. She and Tom realized there was a business opportunity in improving how companies provide sales locations with marketing support materials.

Today, Kate's passion for elevating brands is as strong as ever as she reflects on the power of her own company's brand—and staying true to its core and its people. Kate was born and raised in Glenbeulah near Elkhart Lake, Wisconsin and is the youngest of five children. Kate resides in De Pere, Wisconsin and is the proud mom of Emily, Madalyn and Ben who elevate her each and every day.

Education, Community Engagement & Awards

Marquette University, B.A.

Board of Directors, Women's Fund, 2008-Present

Committee Chair, Women's Fund Friendraiser Committee, 2008-Present

Board of Directors, Boys & Girls Club, 2007-Present

Committee Chair, Boys & Girls Club Wine & Cheese Committee, 2010-Present

Vice President & Advisory Board, East High School Institute of Fine Arts

Fund Development, UWGB/TaylorMade Pro-Am Golf Tournament

2013 ATHENA Award, Green Bay Area Chamber of Commerce

2013 Clara Barton Award, American Red Cross

2013 Board Member of the Year, Boys & Girls Club

Professional Development Session

Presented by Mason Wells

Topic: Case Studies in Private Equity and the Role of the CFO



- Jay Radtke -
Managing Director

As a Managing Director of Mason Wells Buyout Funds, Mr. Radtke is primarily responsible for supporting the investment and portfolio development activities of those funds. In this capacity, Mr. Radtke is responsible for initiating investment opportunities, conducting due diligence, negotiating debt financings, serving on the Board of Directors of portfolio companies and working with portfolio company management teams.

Mr. Radtke has over 15 years of private equity investing experience in middle market companies. Prior to joining Mason Wells in 2006, Mr. Radtke worked for Cornerstone Equity Investors, LLC in New York for five years, where he was responsible for the origination, analysis, due diligence and execution of control-oriented investments in middle market companies in the business services and specialty manufacturing industries. Prior to Cornerstone Equity Investors, Mr. Radtke worked in Lehman Brothers' New York office for three years, where he was an Investment Banking Analyst in the real estate and mergers and acquisitions groups.

Professional Development Session (Continued)

Mr. Radtke is currently a member of the Board of Directors of Coating Excellence International LLC, Mullinix Packages, Inc., and Nelipak Healthcare Packaging. A native of Wisconsin, Mr. Radtke received a Master of Business Administration Degree from Columbia Business School and a Bachelor of Arts Degree from Vanderbilt University.



- **Ben Holbrook** -
Managing Director

As a Managing Director of Mason Wells Buyout Funds, Mr. Holbrook is primarily responsible for the investment and portfolio development activities of those funds. In this capacity, Mr. Holbrook is responsible for initiating investment opportunities, conducting due diligence support, negotiating debt financings, serving on the Board of Directors of portfolio companies and working with portfolio company management teams.

Mr. Holbrook has over 17 years of financial services experience. Prior to joining Mason Wells in 2005, Mr. Holbrook served as a Research Associate at Janney Montgomery Scott in Philadelphia, where he was principally responsible for equity research coverage of the Information Security sector.

Mr. Holbrook serves on the Board of Directors of A&R Logistics, Inc., Eddy Packing Co., Inc., and Whitehall Specialties, Inc. He also serves on the Board of Directors of The Betty Brinn Children's Museum.

Originally from Wisconsin, Mr. Holbrook received a Bachelor of Science Degree with Honors in Psychology from Brown University. He also attended Harvard Business School and completed the Advanced Management Program. Mr. Holbrook competed in the 2004 Olympic Games in Athens, Greece as a member of the United States Olympic Rowing Team.



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April 21, 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 = Personal Development. **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.