



## Conference Programme

- 09:15 - 09:45**    **Registration & Networking**
- 09:45 - 09:50**    **Welcome**  
**Andrew Evans, Partner, Geldards**  
**Huw Thomas, BBC Correspondent**  
(sponsored by Sue Lawrence, Independent Directors and Trustees Limited)
- 09:50 - 10:00**    **Plenary Session 1: Employee Ownership in Wales**  
**Welsh Government**
- 10:30 - 10:45**    **Breakout Sessions 1**
- Valuation of Shares**  
**Ritchie Tout, Partner, Azets**
- Insurance for EO companies**  
**Thomas Carroll Group**
- Banking Panel**  
**Including HSBC, Alex Butler, Partner, Geldards**
- Commercial Risks**  
**Jamie Goldberg, Partner, Geldards**
- 10:45 - 11:15**    **Coffee & Networking**
- 11:15 - 12:00**    **Plenary Session 2: Embedding an EO Culture - turning employees into owners**  
**Joanna Booyen & Verity McVey, Telos**
- 12:00 - 12:45**    **Breakout Sessions 2**
- An Introduction to Employee Ownership**  
**Branwen Ellis, Cwmpas**
- Employment Law Update**  
**Helen Snow, Partner, Geldards**
- Incentivising and engaging staff with non-financial awards**  
**Thomas Carroll Group**
- Financial Freedom - how things change: A case study**  
**Caroline Summers, Paperback Shop**

- 12:45 – 13:45**    **Lunch & Networking**
- 13:45 - 14:30**    **Breakout Session 3**
- EOT bonus issues**  
                         **Tom Lethaby, RVE Corporate Finance**
- Accounting issues for EOT's**  
                         **Rob Meredith, Kilsby Williams**
- Financial Planning**  
                         **Greg Tait, Brewin Dolphin**
- The dynamics between the trading company & Trust Boards & resolving disputes**  
                         **Sue Lawrence, IDT**
- 14:30 - 15:00**    **Coffee & Networking**
- 15:00 - 15:45**    **Breakout Sessions 4**
- Embedding good EO (existing and new staff)**  
                         **Alex Bloom, Telos**
- Using Share Options by EO companies**  
                         **Simon Denton, Milsted Langdon**
- Private Equity & EOT's**  
                         **Debra Martin, Partner, Geldards & DBW**
- Succession Planning**  
                         **Huw Watkins, MD, BIC Innovation**
- 15:45 – 16:00**    **Update from Employee Ownership Association**  
                         **John Beattie, Co-Chair, eoa Membership Council**
- 16:00**            **Close**
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