

## Conference Programme

**09:15 - 09:45** Registration & Networking

**09:45 - 09:50** Welcome

**Andrew Evans, Tax & EO 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

**10:00 - 10:45** Breakout Sessions 1

(a) The Evolution of EOT Valuation and the current state of play

**Katherine Broadhurst, Partner, Azets**

(b) Insurance for EO companies

**Ross Williams, BA (Hons), ACII, Senior Risk Manager, Thomas Carroll Group**

(c) Banking Panel: Financial Pressure & Funding of EOT Businesses

**Simon Williams (HSBC), Alex Butler (Corporate Partner, Geldards), & Jonathan Strange (FD, Celvac)**

(d) Commercial Risks

**Jamie Goldberg, Commercial 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, Partner & Alex Bloom, Partner, Telos**

**12:00 - 12:45** Breakout Sessions 2

(a) An Introduction to Employee Ownership

**Branwen Ellis, Employee Ownership Adviser, Cwmpas**

(b) Employment Law Update

**Helen Snow, Employment Partner, Geldards**

(c) Incentivising and engaging staff

**Fiona Terry, BA (Hons), DipPFS, Senior Employee Benefits Consultant, Thomas Carroll Group**

(d) A case study: Financial Freedom - How things change

**Caroline Summers, CEO, PB Shop**

**12:45 - 13:45**    **Lunch & Networking**

**13:45 - 14:30**    **Breakout Session 3**

(a) **Everything you need to know about Company valuations for an EOT transaction**  
**Tom Lethaby, BD Director, RVE Corporate Finance**

(b) **Accounting issues for EOT's**  
**Rob Meredith, Partner, Kilsby Williams**

(c) **Financial Planning**  
**Emily Tarrant, Wealth Manager, RBC Brewin Dolphin**

(d) **The Different Roles of the Trust and the Board**  
**Sue Lawrence, IDT**

**14:30 - 15:00**    **Coffee & Networking**

**15:00 - 15:45**    **Breakout Sessions 4**

(a) **Embedding good EO (existing and new staff)**  
**Alex Bloom, Partner, Telos**

(b) **Using Share Incentives in Conjunction with an EOT**  
**Simon Denton, Tax Partner, Milsted Langdon**

(c) **Private Equity & EOT's**  
**Debra Martin (Corporate Partner, Geldards), Joanna Thomas (Deputy Fund Manager, DBW) & Nigel Griffiths (Lead Growth Architect and Co-founder, Tailwind Group)**

(d) **Succession Planning**  
**Huw Watkins, Managing Director, BIC Innovation**

**15:45 - 16:00**    **Update from Employee Ownership Association**  
**John Beattie, Co-Chair, eoa Membership Council**

**16:00**            **Close**

