

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

**Adam Price, Cabinet Minister for Enterprise, Connectivity & Energy
Welsh Government**

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: Practical Hints & Trips**
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 generally**
**Fiona Terry, BA (Hons), DipPFS, Senior Employee Benefits Consultant,
Thomas Carroll Group**

(d) **Financial freedom - Case Study: How things change**

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) **HMRC Enquiries: EOT Specific**
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 Employee Ownership**
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 & Stephen McGowan, Finance Director BIC Innovation

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

16:00 **Close**

