



## CFMA Central Ohio eNewsletter

### Upcoming Events

**March 21, 2023- ESOP**

<https://www.eventbrite.com/e/employee-stock-ownership-plan-esop-tickets-566716904517>

**April 18, 2023- Minority and Diversity in Construction Panel**

**May 16, 2023- Site Visit/Happy Hour**

**June 12, 2023- Golf Outing**

<https://www.eventbrite.com/e/2023-central-ohio-golf-outing-tickets-565528269277>

# Construction Financial Management Association

## CENTRAL OHIO CHAPTER

Since 1988

### Understanding ESOPs



**Presenters:**

Greg Daugherty - Porter Wright  
 Pete Shuler - Blue Ridge  
 Brent Thomas - Fifth Third Bank  
 Brent Kirkpatrick - Crowe

**Moderator:**

Bradley Bryant - Plante Moran

**Description:**

ESOPs have become a popular succession planning option. The panel has years of experience implementing and working on ESOPs and will provide their expertise at a high level to outline understanding, forming, and sustaining an ESOP.

**Learning Objectives:**

What is an ESOP and how does it work?  
 Why are ESOPs popular for Construction Companies?  
 How do companies implement ESOPs and keep them sustainable?

**When:**

Tuesday, March 21, 2023

11:30 – 12:00 Registration and Networking  
 12:00 – 1:00 Lunch and Presentation

**Where:**

Fawcett Center  
 2400 Olentangy River Rd, Columbus, OH 43210

**CPE Credit:**

The presentation will count for 1 CPE Credit

**Registration:**

Please register for this event online at  
<https://cenohio.cfma.org/chapters/events>  
 \$25 for CFMA members and \$35 for non-members  
 Contact Jill Claire [centralohio@cfma.org](mailto:centralohio@cfma.org) with questions.

**Who Should Attend:**

Business owners, CFOs, Controllers, and any involved in the succession planning and decision making process.



<http://cafe.cfma.org/centralohio/home>

[Click here to purchase your ticket now!](#)

# Construction Financial Management Association

## CENTRAL OHIO CHAPTER

Since 1988

### Bios:

#### Greg Daugherty

Greg focuses his practice on executive compensation and employee benefits matters for publicly traded and privately held companies and nonprofit organizations. He has extensive experience assisting business owners with their succession planning needs through the implementation of employee stock ownership plans (ESOPs). Greg's practice consists of designing stock and non-stock based incentive plans. It also consists of ESOP transaction planning and ongoing counsel to ESOP-owned companies.

#### Pete Shuler

Pete is VP/Senior Consultant with Blue Ridge ESOP Advisors. He has over 25 years of experience assisting his clients by administering and consulting on ESOPs and other qualified retirement plans. His current responsibilities include consulting with companies considering ESOP-related transactions; consulting on the termination and merger of ESOPs; forecasting the impact of new legislation on the compliance and operation of ESOPs; and coordinating and reviewing repurchase liability studies. Pete frequently speaks and writes on technical topics regarding ESOPs. He has a Bachelor of Business Administration in Finance from the University of Notre Dame.

#### Brent Thomas

Brent is a Senior Vice President and Commercial Banking Manager with Fifth Third Bank in Central Ohio. He has deep experience on both the sales and credit sides of the commercial bank in areas that include client satisfaction, leadership, business development, ESOP/transition options, budgeting, talent development and strategic planning. Brent is the executive sponsor for Fifth Third's ESOP strategy in the Central and Southeastern regions of Ohio, Western Pennsylvania and the state of West Virginia. Brent entered the financial services industry with The Huntington National Bank, serving in a variety of roles, ultimately overseeing commercial banking groups in both Central and Northeast Ohio and also held leadership roles at KeyBank. He is a graduate of Miami University with a BS in Finance.

#### Brent Kirkpatrick

Brent is an audit partner with Crowe LLP leading the Ohio assurance practice for the real estate and construction industries. His clients range in size from \$60 million to over \$1 billion in annual revenues and include general contractors, specialty contractors and heavy highway, some of which are ESOP owned companies. Brent is a member of the board of the Central Ohio Chapter of the Construction Financial Management Association (CFMA) and is also involved with CFMA on a national level through CFMA's Peer Group program as a peer group facilitator. He is a member of the American Institute of Public Accountants (AICPA) and the Ohio Society of Certified Public Accountant (OSCPA). Brent currently serves on the finance committee of the Columbus Metropolitan Club and is a board member of Franklin Cycle Works.

#### Bradley Bryant

I am a leader in our Ohio Construction assurance practice with over 15 years of experience working with construction and other privately held companies. My clients appreciate that I truly value client service and responsiveness. I work hard to bring them industry-specific ideas and valuable business introductions.

I belong to the Ohio Society of CPAs, the AICPA and the Builder's Exchange (law and finance subcommittee member). I serve on several boards including Design Outreach (board member and treasurer), the Greater Columbus Sister Cities International (board member) and the Central Ohio chapter of the Construction Financial Management Association (board member and Vice President). I received my B.S. with an emphasis on accounting and marketing from Miami University.

### CPE:

The Construction Financial Management Association (CFMA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: <https://www.nasbaregistry.org/>



<http://cafe.cfma.org/centralohio/home>



**Save the Date**  
**September 20-21, 2023**  
**Buckeye Conference**

[Please Click Here for Sponsorship Opportunities](#)

**CFMA**

# 2023 BUCKEYE CONFERENCE

**20 - 21 | SEPTEMBER**

GRANDVIEW EVENT CENTER AT GRANDVIEW YARD  
COLUMBUS | OHIO

---

**KEYNOTE SPEAKERS:**




**CHRIS MCALISTER**  
**MAURICE CLARETT**

**EARLY BIRD SPONSORS:**

- Commerce Bank
- Crowe
- FORVIS
- Plante Moran
- Viewpoint

Grandview Event Center at Grandview Yard - Columbus, OH

2023 BUCKEYE CONFERENCE

# SPONSORSHIP OPPORTUNITIES

Benefits	Platinum \$3,000	Gold \$2,000	Silver \$1,000	Bronze \$750	Keynote Speaker #1 Eric Barrett \$5,000 <b>SOLD OUT</b>	Keynote Speaker #2 Chris McAlister \$5,000	Wednesday Reception Dinner \$3,500 <b>SOLD OUT</b>	Tuesday Reception Dinner \$1,000 <b>SOLD OUT</b>	Wednesday Reception Dinner \$500 <b>SOLD OUT</b>	Lunch Only <b>SOLD OUT</b>	Breakfast Only <b>SOLD OUT</b>
Number Available:	unlimited	unlimited	unlimited	unlimited	1	2	2	1	1	2	2
Headline sponsor	Conference				Conference	Conference	Conference and Dinner	Pre-Event Reception Only	Cocktails only	Lunch Only	Breakfast Only
Name on easels on both sides of conference room	✓				✓	✓	✓				
Introduce Keynote speaker					✓	✓					
Verbal recognition at beginning of conference, lunches and reception	✓				✓	✓	✓				
Recognition on placemats	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Logo on conference materials	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Logo and link on conference web page	✓	✓			✓	✓	✓				
Booth	✓	✓	✓		✓	✓	✓	✓	✓	✓	
List of attendees	✓	✓	✓		✓	✓	✓	✓	✓	✓	
Registration for # attendees	2	1			2	2	2				
Recognition on Powerpoint display throughout conference	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

## SIGN UP TO SPONSOR TODAY!

COMPANY NAME: \_\_\_\_\_

CONTACT NAME: \_\_\_\_\_

WISHES TO SPONSOR: \_\_\_\_\_

AMOUNT OF SPONSORSHIP: \_\_\_\_\_

CONTACT NUMBER: \_\_\_\_\_

CONTACT EMAIL: \_\_\_\_\_

**PLEASE SEND SPONSORSHIP REGISTRATION TO:**

CFMA Central Ohio Chapter  
 Email: centralohio@cfma.org  
 Jill Claire, Chapter Administrator  
 Phone: 513-939-2652

**REGISTER ONLINE HERE**

To help keep event costs down, CFMA appreciates sponsors paying by check which includes the option to pay half now and the other half by 7/17/2023

**20 - 21 | SEPTEMBER** 





## Expand Your Construction Contract Knowledge

Wednesday, March 29 & Thursday, March 30, 2023  
3-5 PM (ET), 12-2 PM (PT)

In this course, attendees will gain a legal perspective of how risks can be avoided with specific contract language to help minimize a company's liability exposure. Various case dispute situations, how contract clauses respond to real case examples, and best practice approaches to manage the circumstances will

be addressed. Attendees will also collaborate with the instructors on sample construction project scenarios and determine potential consequences of contract definitions and legal requirements.

**Members:** \$150.00

**Non-members:** \$209.00

[Click here to read more!](#)



## Suicide Prevention Resources

David James, CCIFP Shares The Importance of Suicide Prevention In the Construction Industry

[To learn more, please click here!](#)



## CFMA New Member Open House

Mar 20, 2023 04:00 PM in [Eastern Time \(US and Canada\)](#)

Learn about the member-only resources like CFMA Building Profits Magazine and the Connection Café, events like our Annual Conference & Exhibition and Regional Conferences, newsletters to inform you of



updates and best practices, networking opportunities to expand your industry contacts, volunteer opportunities to enhance your CV, and more!

[Click here to register now!](#)

---



## Central Ohio Chapter Sponsorship Opportunities



	Platinum \$2,500 (Only 6 Available)	Gold \$1,250 (Unlimited)
Chapter Website (centralohio.cfma.org)	➤ Logo on chapter Home Page with hot link to Sponsor’s website	➤ Logo on chapter Home Page
Chapter Email Distribution	<ul style="list-style-type: none"> <li>➤ Sponsor logo on all emails</li> <li>➤ Sponsor logo in newsletter</li> </ul>	<ul style="list-style-type: none"> <li>➤ Sponsor logo on all emails</li> <li>➤ Sponsor logo in newsletter</li> </ul>
Monthly Luncheons (7 Annual)	<ul style="list-style-type: none"> <li>➤ Prominent signage at each luncheon</li> <li>➤ Verbal mention at beginning of each luncheon</li> <li>➤ Lead sponsorship for one luncheon; includes speaker introduction, time to introduce your Company and members in attendance, and offer to assist in planning the luncheon programming</li> <li>➤ Two (2) complimentary admissions<sup>1</sup> to each program (\$490 value<sup>2</sup>)</li> <li>➤ Table space made available for sponsor’s marketing materials</li> </ul>	<ul style="list-style-type: none"> <li>➤ Prominent signage at each luncheon</li> <li>➤ Verbal mention at beginning of each luncheon</li> <li>➤ Two (2) complimentary admissions<sup>1</sup> to each program (\$490 value<sup>2</sup>)</li> <li>➤ Table space made available for sponsor’s marketing materials</li> </ul>
Events (social, educational, other)	<ul style="list-style-type: none"> <li>➤ Prominent signage at each event</li> <li>➤ Verbal mention at beginning of each event</li> </ul>	<ul style="list-style-type: none"> <li>➤ Prominent signage at each event</li> <li>➤ Verbal mention at beginning of each event</li> </ul>
Golf Outing	<ul style="list-style-type: none"> <li>➤ Name and logo on flyer</li> <li>➤ Name on email promotions</li> <li>➤ Name on sponsor board</li> <li>➤ Verbal and visual recognition at dinner</li> <li>➤ Four (4) complimentary admissions to golf and dinner (\$580 value)</li> <li>➤ One hole sponsorship (\$100 value) with sign, table and chairs, if desired</li> </ul>	
Included Value	\$1,170 (47% of contribution)	\$490 (39% of contribution)

1 The total Program Admissions allotted can be used at your discretion throughout the fiscal year 7/1/20-6/30/21.

2 Admission price is based on non-member rate of \$35/person.



**The first woman to fly solo around the world was from Columbus.**

[To learn more, click here!](#)

---

Platinum Sponsors



Gold Sponsors

