



**colorado chapter**  
*connecting financial executives*

## FEI Colorado Chapter

### CPE Details

Event Date: February 15, 2018

Event Time: 4:00pm – 8:30pm

### Dinner Session

Presentation Title	How to MBO or ESOP? Approaches We Took in Transitioning a Successful Family Business.
Presenter	Chris Banks, Owner and CFO, Odell Brewing Co.
Presentation Description/Program Content	Will the MBO or ESOP model work for your company? What don't the advisors tell you? Many factors lead to a successful transition. Is there strong corporate leadership outside of family members? Are the employees engaged? Is the corporate culture conducive? Is the business plan viable? Hear what to consider from a real-life success story.
Learning Objectives	<ul style="list-style-type: none"> <li>• 1- Learn financial factors to consider in transitioning to a MBO/ESOP</li> <li>• 2 - Building the necessary team; including management, employees, and culture</li> <li>• 3 - Understanding what success looks like: Do you have a vision</li> </ul>
NASBA Field of Study	Business Management and Organization
Instructional Delivery Method	Group Live Lecture
Recommended CPE Credit	1 CPE Hour (50 minutes as defined by NASBA)
Prerequisites	None
Program Level	Intermediate
Advanced Preparation	None
Experience Level	Intermediate

### PD1

Presentation Title	Recruiting, Hiring and Managing Employees
Presenter	John Wallace, Division Director, Robert Half Management Resources
Presentation Description/Program Content	For any company or department to be successful, it must have a highly skilled team - and finding and keeping these employees can be challenging. This presentation offers advice on maximizing your

	recruitment process, tips on evaluating applicants and finalizing your hiring decision and useful techniques for motivating and managing your employees.
Learning Objectives	<ul style="list-style-type: none"> <li>• 1 – Tips on how to maximize recruitment process</li> <li>• 2 -How to evaluate job applicants (reviewing resumes/interviewing best practices)</li> <li>• 3 -How to effectively manage, motivate and retain employees</li> </ul>
NASBA Field of Study	Personnel/HR
Instructional Delivery Method	Group Live Lecture
Recommended CPE Credit:	1 CPE hour (50 minutes as defined by NASBA)
Prerequisites:	None
Program Level:	Intermediate
Advanced Preparation:	None
Experience Level:	Intermediate

## PD2

Presentation Title	Blockchain 101 and What Financial Executives Need To Know About This Revolution
Presenter	John Carpenter, Co-Founder, Global Blockchain Summit
Presentation Description/Program Content	What is Blockchain. It is a fraud tolerant distributed ledger technology (DLT) that emerged out of the creation of Bitcoin, and has become a technology that is impacting all industries in a way that's similar to how the Internet changed how things are done. There are many industries that are affected, finance (fin-tech), healthcare, legal (smart contracts), supply chain, and the Internet of Things (IoT). New concepts are also emerging that are very relevant to the financial industry, including Initial Coin Offerings, (ICOs), use of Bitcoin, Ethereum and other cryptocurrencies, and even how Wall Street is embracing cryptocurrency in offering a futures market for Bitcoin.
Learning Objectives	<ul style="list-style-type: none"> <li>• 1 - Understand the basics of Blockchain and how it works.</li> <li>• 2 - Understand the uses of Blockchain and cryptocurrency (tokens) in corporate America and the associated financial ramifications of it's adoption.</li> <li>• 3 - Understand how the SEC, IRS and Wall Street view Initial Coin Offerings (ICOs), and the use of Blockchain tokens and cryptocurrencies.</li> </ul>
NASBA Field of Study (see attached):	Economics
Instructional Delivery Method:	Group Live Lecture
Recommended CPE Credit:	1 CPE hour (50 minutes as defined by NASBA)
Prerequisites:	None
Program Level:	Intermediate
Advanced Preparation:	None

Experience Level:	Intermediate
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