

Technical Assistance and Professional Service Providers for Employee Owned Businesses

Wisconsin has a robust network of technical assistance and professional service providers that support existing employee-owned businesses and groups interested in starting new employee-owned businesses. Below is a list of resources and advisors.

Cooperative Professional Advisors

ACCOUNTANTS

Wegner and Associates LLC - Madison, Baraboo, Janesville, and Pewaukee, WI
Bruce Mayer, Partner, bruce.mayer@wegnercpas.com, (608) 442-1939 (Madison, WI)

Clifton Allen Larson - 13 Wisconsin locations
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LEGAL COUNSEL

Carlson Black LLP - Madison, WI
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Herrick & Kasdorf - Madison, WI
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von Briesen & Roper, s.c. - Milwaukee, WI
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Dorsey & Whitney LLP - Minneapolis, MN
David Swanson, Attorney and Cooperative Law Practice Group Co-chair, swanson.dave@dorsey.com,
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Stoel Rives LLP - Minneapolis, MN
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Cross Law Firm - Milwaukee, WI
Nola J. Hitchcock Cross, Attorney, njhcross@crosslawfirm.com, (414) 224-0000

Deborah Groban Olson, Attorney at Law (ESOPS and cooperatives) - Grosse Pointe Park, MI
Deborah Groban Olson, Attorney, dgo@esoplw.com, 313-331-7821

NETWORKS AND TRADE ASSOCIATIONS

Cooperative Network - Wisconsin and Minnesota

Cooperative Network is committed to building Wisconsin's and Minnesota's cooperative businesses. It provides government relations, education, marketing, and technical services to a wide variety of over 400 member-cooperatives. www.cooperativenetwork.coop

MadWorC - Madison, WI

MadWorC is a network of worker cooperatives joining together to build a thriving, sustainable democratic economy in the Madison, Wisconsin, area. www.madworc.org

TECHNICAL ASSISTANCE PROVIDERS

University of Wisconsin Center for Cooperatives - Madison, WI

Established in 1962, the staff at the University of Wisconsin Center for Cooperatives pursues a research, educational, and outreach agenda that examines cooperative issues across multiple business and social sectors. The agenda encompasses all aspects of the cooperative business model, including development, finance, structure, and governance. www.uwcc.wisc.edu

Courtney Berner, Executive Director, cberner@wisc.edu, (608) 890-0966

Cooperative Development Services - Wisconsin and Minnesota

Since 1985, Cooperative Development Services has helped existing cooperatives retain their vitality and plan for future growth opportunities. CDS also actively engages with new cooperatives and organizations operating in a cooperative manner to launch new business ventures and plan for long-term viability. www.cdsus.coop

Kevin Edberg, Executive Director, kedberg@cdsus.coop, (651) 287-0184

Cooperative Network - (see listing in Networks and Trade Associations)

Democracy at Work Institute

A nonprofit cooperative education and development project started by the US Federation of Worker Cooperatives in 2013, DAWI's goal is to ensure that the worker cooperative movement grows strategically and effectively, with a focus on developing cooperative solutions in economically and socially marginalized communities. www.institute.coop

Madison Cooperative Development Coalition (MCDC)

Founded in 2017, MCDC is the City of Madison's initiative to form worker cooperatives that address income inequality and racial disparities by creating living-wage and sustainable jobs. MCDC supports the growth and creation of worker cooperatives, specifically addressing the factors affecting local communities of color, low-wealth, and traditionally excluded workforces. www.mcdcmadison.org

Charity Schmidt, Cooperative Development Specialist, cschmidt2@wisc.edu, (608) 262-5905

U.S. Federation of Worker Cooperatives

The United States Federation of Worker Cooperative is a national grassroots membership organization of and for worker cooperatives, democratic workplaces, and organizations that support the growth and development of worker cooperatives. Founded in 2004, USFWC provides support to their members and educational outreach to the public through conferences and events, resource referrals, and networking and training opportunities.

<http://www.usworker.coop/>

ESOP Professional Advisors

THIRD PARTY ADMINISTRATORS

Blue Ridge ESOP Associates - Locations nationwide

Chad Guzinski, Business Development, Midwest, 434-220-7945, cguzinski@BlueRidgeESOP.com

ESOP Partners - Appleton, WI

Aaron Juckett, President, 920-659-6002, ajuckett@esoppartners.com

Principal Financial Group - Appleton, WI

John Prodoehl, Consultant, 800-224-0144

LEGAL COUNSEL

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DeWitt Ross & Stevens S.C. - Madison and Milwaukee, WI, Minneapolis, MN

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Timothy Stewart, Attorney, 262-754-2869, tls@dewittross.com (Brookfield, WI)

Reinhart Boerner Van Dueren, S.C. - Milwaukee, WI

Steven Huff, Attorney, 414-298-8126, shuff@reinhartlaw.com

VALUATION

Enterprise Services, Inc. (ESI) - Delafield, WI

Scott D. Miller, Founder/President, (262) 646-6490, esi@esi-enterprise.com

Craig Olinger, Principal, (262) 646-6490, colinger@esi-enterprise.com

C & M Valuations - Waukesha, WI

Charles Rodieck, Vice President (262) 521-0411

Wipli CPAs and Consultants - Milwaukee, WI

Pamela Branshaw, Partner in Charge, (414) 431-9300

TRUSTEES

Professional Fiduciary Services - Milwaukee, WI

J. Michael Maier, President, (414) 319-4100, maier@professional-fiduciary.com

NETWORKS AND TRADE ASSOCIATIONS

Employee Ownership Foundation

The Employee Ownership Foundation's (EOF) primary purpose is to support programs that will increase the level of awareness and appreciation of the benefits of employee ownership and increase the number of employees who have access to this benefit. www.employeeownershipfoundation.org

Employee-Owned S Corporations of America (ESCA)

ESCA is the voice in Washington, DC that speaks exclusively for employee-owned S corporations ("S ESOPs"). Since 1998, ESCA's membership has grown to represent more than 140,000 employee-owners in virtually every state in the nation. www.esca.us

ESOP Association – Wisconsin Chapter

The Wisconsin Chapter provides the only regularly-scheduled opportunities in the State of Wisconsin for ESOP networking with other employee owners and ESOP professionals. As part of The ESOP Association, the Wisconsin Chapter has been actively assisting ESOP Companies grow in their technical knowledge and communications skills with their employee owners. www.wiesop.org

National Center for Employee Ownership

The National Center for Employee Ownership (NCEO) is a nonprofit membership and research organization that that serves as the leading source of accurate, unbiased information on employee stock ownership plans (ESOPs), equity compensation plans, and ownership culture. www.nceo.org

TECHNICAL ASSISTANCE PROVIDERS

Ohio Employee Ownership Center

The Ohio Employee Ownership Center (OEOC) is a non-profit, university-based program established at Kent State University in 1987 to provide outreach, information, and preliminary technical assistance to Ohio employees and business owners interested in exploring employee ownership. The OEOC provides preliminary technical assistance to companies, community groups, and unions that are interested in exploring the possibility of employee ownership for their particular situation. www.oockent.org