



West Suburban Association
of Plumbing Contractors



October 29-30, 2018

The Pfister Hotel • Milwaukee, WI

WSA introduces an education initiative designed to help your company find its way through the woods.

The Pfister Hotel
424 E Wisconsin Ave
Milwaukee, WI 53202



< 28
SUNDAY 2829
MONDAY 2930
TUESDAY 3031
WEDNESDAY 31

>

MONDAY

- 11:30 AM Lunch
- NOON Preventing and Responding to Sexual Harassment in the Workplace
- 1 PM Implications of the New Tax Law for Contractors
- 2 PM Finding Tomorrow's Leaders: KNOWING Y
- 3 PM Estimating Techniques for Current and Future Markets
- 4 PM The WSA/Local 130 Labor Agreement: Breaking It Down



Dinner at Harbor House WSA has arranged for a private dinner for CEO Campers at Harbor House, a ★ ★ ★ ½ restaurant as rated by the Milwaukee Journal Sentinel, and a Wine Spectator Best of Award of Excellence winner since 2017.

Harbor House is a bright, spacious New England-style seafood restaurant Milwaukee residents and visitors love, set on the shore of Lake Michigan. The restaurant offers a premier lakefront dining experience and the freshest seafood flown in daily from both coasts. The interior features a three-sided bar, a raw bar, an open kitchen, and a private dining room available for special events and parties. A seasonal outdoor patio features a full bar, Adirondack chairs and unparalleled views of the lake, the Milwaukee Art Museum, and Milwaukee's skyline.

TUESDAY

- 7:30 AM Breakfast
- 8 AM Active vs. Passive Investment Management: Where Does Each Belong in Your Portfolio?
- 9 AM Controlling Your Total Cost of Risk: Captives and Risk Management in the Construction Industry
- 10 AM Is Your Data at Risk?
- 11 AM Job Review Process through Bid, Preconstruction, Interim and Postmortem Project Phases

WHO SHOULD ATTEND

CEO Camp is designed for your company's current management, or individuals who have some managerial aspect to their job. However, just about anyone in a contractor's office will find something to take away from CEO Camp.

REGISTRATION INFORMATION

WSA is making 30 scholarships available for CEO Camp. Attendance at CEO Camp is FREE to the first 30 WSA members (registration required), then just \$50 for other attendees.

MEAL INFORMATION

Lunch will be provided on Monday, Oct. 29, with dinner for CEO Camp attendees that night at Harbor House. Breakfast and lunch will be provided on Tuesday, Oct. 30.

HOTEL INFORMATION

WSA has secured a room block the night of Oct. 29 at The Pfister for CEO Camp. Check-in time is 3 p.m., but attendees may leave their bags at the front desk upon arrival in order to attend CEO Camp programs. **WSA is covering the costs of its members to stay at the Pfister and will book your room upon registration, but you must register by Oct. 1.** The Pfister will also honor WSA's room block on Oct. 28. Members wishing to arrive on Sunday will be responsible for their own room rental for that night. In the event that you cancel your room reservation past the deadline for refunds, WSA will bill you for the room fees incurred.



COUNSELORS



MICHAEL ALBERICO
Assurance Agency

Michael is a Senior Vice President and Construction Practice Leader at Assurance, as well as the Practice Leader of Assurance's Alternative Risk program. He maintains a special focus on the construction and real estate industries, as well as alternative risk financing. With nearly 30 years of experience, Michael's primary responsibility is to provide a comprehensive and integrated risk management program that fully addresses risk needs while maintaining price sensitivity. He consults with clients so they can make the most informed decisions when it comes to their business insurance. Assurance clients value the process he takes to control and reduce claims and ultimately save them money.

Michael graduated from the University of Illinois at Champaign-Urbana with a Bachelor of Arts degree in History. Since 1984, he has served on numerous boards and participated in community outreach initiatives with local organizations throughout the Chicagoland area.



JAMES F. COYNE
Plumbers Local 130

James F. Coyne is the Business Manager of Plumbers Local Union 130 U.A. Jim is a 40-year member of the Union and in his first 25 years of his plumbing career, he worked on many commercial buildings and high rises in downtown Chicago. In 1987, Jim was appointed by Business Manager James J. McCarthy as a part-time officer. He held multiple part-time positions until the year 2000 when Business Manager Gerald M. Sullivan appointed Jim to a full-time position as Recording Secretary. In 2002, Jim was appointed as the Financial Secretary/Treasurer where he served for the next 10 years. In 2012, Jim was elected as the Business Manager in the largest plumbing local within the United Association and has a jurisdiction of 17 counties in northern Illinois. In May 2018, Jim and his slate of officers were re-elected without opposition to another term of office.



MARK GALLEGOS
Porte Brown

Mark is Senior Tax Manager at Porte Brown. He has practiced public accounting for more than 18 years, advising business and individual clients on a broad range of tax and business matters including mergers and acquisitions, tax controversy, multi-state taxation and R&D tax credits and incentives.

Prior to joining Porte Brown LLC, he worked for two national accounting firms focusing on middle market clients. He has extensive experience working with closely held companies and providing tax strategies for a wide range of industries.

Mark earned a B.S. in Accountancy from the University of Kentucky and a Master of Science in Taxation from DePaul University.



ADAM MIHOLIC
Assurance Agency

Adam is the Director of Alternative Risk at Assurance. His areas of expertise include captive structures, such as pure captives, 831(b)/small captives, group captives, cell captives, risk retention groups and self-insured groups. Adam oversees the management and growth of Assurance's current alternative risk programs, including Urgent Care Assurance Company, AssureCap and the Risk Management Association for Illinois-based contractors. His main responsibility is to help clients make informed decisions based upon their risk tolerance and purchasing preferences with an end goal of lowering total cost of risk.

Adam received a Bachelor of Arts degree from Marquette University and his Master's degree in Business Administration (MBA) from Arizona State University. Adam holds his Commercial Lines Coverage Specialist (CLCS) designation and is a member of the Captive Insurance Companies Association (CICA). He has volunteered with Habitat for Humanity, Big Brothers/Big Sisters and CYA of Milwaukee.



TOM POSEY
FAEGRE BAKER DANIELS

Tom represents employers in all aspects of labor and employment law and also represents private companies in construction and commercial litigation matters. He serves as chief labor negotiator for building trade, hospitality, manufacturing, automotive and other industry clients in collective bargaining, and represents and counsels employers in a wide range of employment disputes. Tom has extensive litigation and trial experience before arbitrators, state and federal judges and juries, and numerous administrative agencies, and has successfully argued several cases before the U.S. Court of Appeals for the Seventh Circuit. He regularly counsels clients and gives presentations to businesses and trade groups on a variety of employment, labor relations and human resources issues, with an emphasis on litigation practice and avoidance.



MICHAEL A. SLONEK, CFA
Strategic Capital
Investment Advisors, Inc.

Michael has more than 8 years of experience in the areas of pension consulting, portfolio management, manager research and due diligence, and performance reporting. Mike's primary responsibilities include the delivery of investment consulting services, manager research and due diligence, and client portfolio transitions.

Before rejoining Strategic Capital, Mike was a Portfolio Manager within the trust department of a wealth management firm. In this role, Mike was responsible for designing, implementing, and managing high-net-worth client portfolios. Other past positions include senior analyst at Strategic Capital and junior research analyst for a fund of hedge funds investment management firm.

Mike earned a BBA in Finance from Illinois State University. He is a Chartered Financial Analyst and a member of the CFA Institute.



KEITH RAHN
Auburn University

Keith A. Rahn is an Associate Professor at Auburn University in the McWhorter School of Building Science. Previously, he served as an Instructional Assistant Professor at Illinois State University for 9 years in the Construction Management program. Mr. Rahn has taught classes in mechanical and electrical systems, project management & administration, estimating & project scheduling and construction material & methods. In addition to his teaching and research responsibilities, he is the current faculty advisor for the MCAA Student Chapter at Auburn and President of Sigma Lambda Chi International, which is the Honorary Society for Construction Management. In 2007, the MCAA presented him with the "Educator of the Year" award at the national convention. In 2017, he received an Associated School of Construction "Regional Teaching Award" from southeast region. With 15-years of mechanical industry experience in estimating, project management and ownership with MCAA contractors, his industry knowledge coupled with his educational background provides an unparalleled classroom experience.



JODIE SWEE
XYZ UNIVERSITY

Jodie is an expert on youth culture and has a passion for bridging the gap between generations. She has been speaking on national stages for over 15 years to teenagers and young adults with the goal of helping them understand themselves and the world around them.

Before joining the XYZ University team, Jodie served as an Area Director for Young Life, a non-profit outreach organization for teenagers. In that role she lived at the generational crossroads as she spent countless hours engaging teenagers and young adults in meaningful dialogue while at the same time inspiring and training older adults to do the same.

Jodie graduated from Illinois State University in 2000 with a BS in Communications and has a background in sketch comedy. That combination means she has a desire to communicate clearly and effectively without putting people to sleep. Jodie is delighted to bring those skills to the exciting conversation about generational differences in the workplace.



Don't miss this important program designed to help your company prepare for a brighter future.

Preventing and Responding to Sexual Harassment in the Workplace

WSA Legal Counsel Tom Posey, Faegre Baker Daniels

Everywhere we turn, echoes of “Me Too” reverberate. How can contractors prevent workplace harassment and limit potential liability? Find out at this interactive presentation, led by WSA Legal Counsel Tom Posey of Faegre Baker Daniels. You'll learn what does/does not constitute sexual harassment, as well as employment policies and best practices to prevent harassment. How should you respond to an employee complaint? Attend this important session and learn how.

Implications of the New Tax Law for Contractors

Mark Gallegos, Porte Brown

Changes to our tax laws will have a significant effect on contractors. What will they mean to you? Don't miss this important discussion, which will address, among other things, what you can – and now cannot – deduct as business expenses.

Finding Tomorrow's Leaders: Knowing “Y”

Jodie Swee, XYZ University

Millennials are changing the face of business, and they're the next generation of leaders for today's contractors. What drives them? How can you identify, engage and retain your company's next influencers? Join WSA for this insightful, sometimes humorous, and often shocking view into the Millennial mindset and the future of the workplace. In this presentation, you will be introduced to the recruiting, retention, management, and team-building techniques needed to engage the next generation and create a productive, happy workplace for all generations.

Estimating Techniques for Current and Future Markets

Keith Rahn, Auburn University

The most successful contracting firms are the one who have a “Vision” and know the “Cost of Doing Work.” The plumbing market is consistently changing due to owner needs, technology, new material/methods and innovative construction practices, such as Leadership in Energy and Environmental Design (LEED). Communication between management and the estimator is essential. Upper management should be continuously monitoring the plumbing industry market trends and working with estimators to develop the tools needed to implement the plan. This session will focus on trends in estimating/markets and fostering communication within your company.

The WSA/Local 130 Labor Agreement: Breaking It Down

*Plumbers Local Union 130
Business Manager Jim Coyne,
WSA Legal Counsel Tom Posey,
Faegre Baker Daniels*

The current Collective Bargaining Agreement with Local 130 doesn't expire until May 31, 2020. Do you know what it says? Some things in it might surprise you. Here's your chance to ask questions and get answers on the document that you work under every day.

Active vs. Passive Investment Management: Where Does Each Belong in Your Portfolio?

*Mike Slonek,
Strategic Capital Investment Advisors,
Inc.*

When it comes to your investment portfolio, do you know whether you should use a passively managed strategy or an actively managed strategy? Attend this program and you'll learn the answer to questions including:

- What's the difference between the two approaches?
- In which asset classes does passive management make sense?
- Which index should a passive strategy replicate?
- What is the cost to employ passive management?
- In which asset classes does active management make sense?
- What is the cost to employ active management?
- What additional risk is taken on by employing active management?
- How do you manage this additional risk?

Controlling Your Total Cost of Risk: Captives and Risk Management in the Construction Industry

*Michael Alberico and Adam Miholic,
Assurance Agency*

The insurance market is constantly changing. This session will review the basic structures, considerations, and values of a Captive insurance program and how they can be used within today's construction industry. Other risk management and financing tools will also be discussed, so that participants will walk away with a basic understanding of the various ways to control and reduce their total cost of risk.

Is Your Data at Risk?

Byron Franz, FBI

We hear stories about hackers every day breaching security at big data firms and credit card companies. Today's contractors, big and small, are also at risk. Hear from a cyber-security expert on ways you can protect information that is vital to your company's health.

Job Review Process through Bid, Preconstruction, Interim and Postmortem Project Phases

Keith Rahn, Auburn University

Currently, we are experiencing a "seller" market in the plumbing industry. The question to ask is: "How well is your company positioned for an economic downturn?" The construction industry economy will cycle from a "seller" to a "buyer" market. The problem is during strong economic periods we tend to overlook issues with productivity, project management and corporate operations due to the larger margins. This session will discuss the need for companies to continually review all aspects of their operations to maximize margins now and prepare for future markets.



ABOUT THE PFISTER HOTEL

The Pfister Hotel is celebrating 125 years in 2018. Built in 1893, the Pfister Hotel has been a downtown Milwaukee hotel icon for well over a century. As one of the Midwest's premier luxury hotels in Milwaukee, it continues to celebrate a grand tradition of gracious service and impeccable style. From the moment you arrive, you'll notice the extraordinary architecture inside and out punctuated by a welcoming ambiance from staff and fellow guests alike.

2018 CEO CAMP MEETING REGISTRATION

Company Name _____

Contact Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

E-Mail _____

ATTENDEES

Name _____ E-Mail _____

Name _____ E-Mail _____

Name _____ E-Mail _____

Name _____ E-Mail _____

Please copy for additional attendees.

Complete, tear at perforation and return BY OCTOBER 1, 2018 to:

WSA

3759 N. Ravenswood Ave. Suite 129
Chicago, IL 60613

Email: shala@wsacontractors.org • **Questions?** Call WSA at (773) 529-1212

REGISTER ONLINE: WWW.WSACONTRACTORS.ORG



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of Plumbing Contractors

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