

The Certificate Program for Non-Professional Fiduciaries

February 11-14, 2018
San Diego, CA



Program Overview

You are invited to participate in our fifth annual Certificate Program for Non-Professional ESOP Fiduciaries – to be held at the Rady School of Management, UCSD, Feb., 11-14, 2018.

One of the fundamental resources of the employee stock ownership plan (ESOP) movement is the large group of dedicated, well-intentioned people who agree to serve as trustees or other fiduciaries on behalf of their company's ESOP. If you are one of those dedicated people, you have undoubtedly felt the concern that is inevitable when taking on that sort of responsibility. The Beyster Institute at UCSD has developed a special intensive education program to help relieve some of that concern - the Certificate Program for Non-Professional ESOP Fiduciaries.

Course Curriculum

The course curriculum takes place over two and a half days and includes a combination of classroom activities, group exercises, case study simulations, guest lecturers, and group discussion to assure students' mastery of the numerous areas of responsibility attached to this vital role in the ESOP movement.

Course content includes:

- A review of the standards for appropriate fiduciary action given the potential range of decisions that will have to be made.
- Small group work to assure that students grasp the full nature and responsibilities of the role.
- In-depth exploration of the practical responsibilities that fiduciaries must deal with in their role.
- Examination of a wide range of fiduciary decision-making situations, with practical guidance from our faculty and guest experts.

After a final review and proof of mastery exam, each student will receive a certificate issued by the University of California San Diego, Rady School of Management attesting to their mastery of the concepts and skills necessary to serve as a non-professional fiduciary.

We are very proud to be the first to offer this intensive educational program. We believe it is an essential part of the training for anyone who is not a professional fiduciary yet who is acting as, considering acting as, an ESOP trustee or fiduciary committee member.

Dedicated Faculty

Neil Brozen, managing director, BTC ESOP Services

Larry Goldberg, partner, ESOP Law Group

Christopher Kramer, managing director, Strategic Equity Group

Anthony Mathews, secretary, California Center for Employee Ownership

Martin Staubus, executive director, Beyster Institute at the Rady School of Management, UC San Diego

Register Online

<http://beyster.fiduciary.2018.kintera.org/>

Program Fee

\$1,595

(Fee includes tuition, course materials, campus parking, breakfast, lunch and a welcome dinner on Sun., Feb. 19.)

Register by Jan. 1, 2018, and save \$200

Ask us about additional discounts for multiple registrations from the same company. Enroll early – space is limited.

Location

Otterson Hall, UC San Diego
Rady School of Management

Program Contacts

Registration and general questions:
Ron Zollars - rzollars@ucsd.edu
858.246.0654

Questions on program content:
Martin Staubus, executive director
mstaubus@ucsd.edu
858.822.6011

Testimonials: Certificate Program for Non-Professional ESOP Fiduciaries

“Thanks to the entire Beyster team at UCSD! The course provided the education we all need to be successful and effective ESOP trustees for our companies. I feel better educated on what is and isn’t our responsibility as trustee. I feel empowered!”

Ramona Alms, ESOP trustee and CFO, Dini Spheris, Houston, TX

“I feel hugely more empowered to make decisions that won’t get my company into trouble! Very much worth the time away from the office.”

Liesl Deck, ESOP trustee and financial controller, GSI Water Solutions, Portland, OR

“I feel better prepared for my role as ESOP trustee – and nice to know I’ve earned a certificate!”

Deanna Hansen, internal trustee, Environmental Science Associates, Los Angeles, CA

“Very useful and thoughtful program. I appreciate the knowledge, professionalism and wisdom in the room – Wow!”

Jon Fredricks, president, The Welk Group, Inc., Escondido, CA

“Thanks Beyster team ... you guys rock! And the biggest treat was how great my fellow classmates were!”

William Schlichter, CEO and trustee, EMN Defense Systems, San Diego, CA