



Todd Luft
President



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Kathleen Schilling
Executive Director

OED advances the business prosperity of Ozaukee County collaborating with community, regional and business partners ensuring a growing and diversified economy.



Presenting Sponsors



You are invited to join us for the Second Annual
Business of the Year Award & Economic Forecast Breakfast

Wednesday, September 24, 2014—7:30—9:15 am

**Ozaukee Pavilion—Ozaukee County Fairgrounds
W67 N890 Washington Avenue, Cedarburg**

2014 Business of the Year Awards presented to



Mike Ansay



Bill Johnson & Bob Johnson



Scott & Beth Shully

Economic Forecast

Rapid Fire Panel Discussion

Moderator

Dr. David Borst, Dean of the Concordia School of Business and Legal Studies

Panelists

Bill Morse, CFP, Senior Vice President, Financial Advisor, Ziegler Wealth Management

Sara Walker, CFA, Senior Vice President & Investment Officer, Associated Bank

Michael J. Weil, CIMA®, CFP®, CLU® Director, Next Generation Wealth Management

Cost per Person \$20.00—\$150.00 Table of Eight

Please see page 3 for reservation form.

Ansay & Associates

The Large Business of the Year is Ansay and Associates which headquartered in Port Washington.

Ansay was founded in 1946 by Adolph Ansay and continues to remain a family-run business. Since 1995, the company has been in a growth and expansion mode, opening in new markets (Green Bay, West Bend, Fox Valley) and acquiring complimentary businesses. The company has seen its employees grow from 85 in 2009 to 200 employees currently. As part of this growth, sales have almost tripled over the past five years. As a company that focuses on a relationship of trust and integrity with their clients, community support is vital to the company. Ansay & Associates is a contributor to Portal Industries, the Port Washington Historical Society, the Luxembourg American Cultural Center, Port Washington's Fish Day and allows employees to contribute eight hours of paid work time to the non-profit of their choice helping expand their community support. Tom Meaux, Ozaukee County Administrator stated "Mike Ansay and his team not only are growing their business and creating local jobs but also giving back to our community in so many ways". We salute their business efforts and long standing legacy in Ozaukee County.

Johnson Level

The Mid-Size Business of the Year is Johnson Level in Mequon. Founded in 1947, Johnson Level is a leading manufacturer of professional quality tools. During the current recession to counteract a drop in retail spending and construction trades work, Johnson Level adapted its businesses processes to maintain and continue its growth, adopting a Lean Manufacturing initiative that focuses on workshop optimization instead of staff reductions and began expanding current international business relationships to increase its exporting to foreign markets. Within these new initiatives, Johnson Level has increases its workforce by over 12% and seen a 27.5% increase in their revenue. As a third generation family owned business, Johnson Level continues to give back to the community working with the WOW Workforce Development Board, Mequon—Thiensville Board of Education, Junior Achievement and Boy Scouts of America. Francisco Sanchez, Waukesha-Ozaukee-Washington County Workforce Development Board President, said about Johnson Level "As a locally owned manufacturer with a global impact, the company remains committed to supporting important community causes and business efforts, such as providing leadership on our Board".

Shully's Cuisine & Events

The Small Business of the Year is Shully's Cuisine & Events in Thiensville. Shully's Cuisine & Events opened in Thiensville in 1984. The company, which was founded by Scott & Beth Shully has seen significant growth in their revenue stream and has developed an ever-expanding base of clients. In 2013, Shully's expanded their current facility adding their new event space, the Watermark, which will allow the company to continue to grow the events it has at its facility. Additionally, Shully's has been cultivating relations with other event venues spaces to increase business opportunities and recently signed a contract to provide services at Ramhorn Farms in Newburg. Shully's has always been a strong community partner, working with non-profits and community organizations by providing reduced room fees and food costs. Dr. Karl Hertz, former Thiensville President and current Ozaukee County Board member, stated "that over the past 20 years, Shully's has creatively grown while maintaining as excellent sense of community pride, involvement and principled citizenship".

Economic Forecast Speakers



Bill Morse, is a Certified Financial Planner and holds Series 7, Series 65 and life/health insurance licenses. Mr. Morse is consistently among Ziegler's top investment consultants. He has spoken to groups from Vermont to Oregon, California to Florida and has been published in national publications including USA Today. He has also been a guest on TV and radio stations.

Bill earned his Bachelor of Arts degree in Political Sciences degree from the University of Wisconsin—Milwaukee



Sara Walker, is Senior Vice President, Senior Portfolio Manager with Associated Private Client & Institutional Services. As a Chartered Financial Analyst, Sara joined Associated in 1997 and has more than 30 years of investment management experience. In her highly visible role as Associated's economist, Sara addresses shareholders at the company's annual meetings, is a speaker at client engagements and widely quoted as an expert in the media.

Sara earned her Bachelor of Science degree from the University of Wisconsin-Parkside and her Master of Business Administration degree from the University of Wisconsin—Milwaukee.



Michael J. Weil, CIMA®, CFP®, CLU®, Director of Wealth Management, Next Generation Wealth Management, a Milwaukee-based independent wealth management firm. Recently, NGW was recognized as one of the "Top 25 Fastest-Growing Firms" in the United States as compelled by the *Financial Advisor Magazine*. Mr. Weil has more than twenty years of experience working closely with individuals and families with an expertise in investment management, financial planning and risk management strategies. He has earned the professional designations of Certified Investment Management Analyst and CERTIFIED FINANCIAL PLANNER™.

Mr. Weil holds a degree in Business Administration & Finance from UW-Milwaukee where he graduated with the distinction of magna cum laude.

Business of the Year & Economic Forecast Breakfast Registration Form

Cost per person \$20.00—\$150 Table of Eight

For reservations please fill out and return with check to: (sorry charge cards not accepted)
Ozaukee Economic Development, P O Box 994, Port Washington, WI 53074

Name: _____ Phone _____

Business _____ E-Mail _____

For table of eight, please send names of all attendees

For more information, please contact kschilling@co.ozaukee.wi.us or 262.238.7730

Cedarburg Mayor's Forum—June 5, 2014—Cedarburg Cultural Center



Mayor
Kip Kinzel

On June 5th, Mayor Kip Kinzel welcomed 60 Cedarburg business people to the Cedarburg Cultural Center for his first Mayor's Forum. OED partnered with the City on the forum. The program offered local businesses the opportunity to let the City know both the benefits and challenges in locating a business in Cedarburg. Kathleen Cady Schilling, Executive Director of Ozaukee Economic Development moderated a panel of current Cedarburg Business Owners, Ryan Olsen of the Piggly Wiggly, Jim and Karen Lillie of Lillies and Weeds, Jerry Edquist of Carlson Tool, Eric Fix of Out and Out and Mary Sheffield of the City of Cedarburg. Each of the panelists spoke of the reasons they located in Cedarburg and why they would recommend to other businesses to locate here. They then spoke about the concerns they have on continuing to locate or expand within Cedarburg.



Kathleen
Schilling

After the panelists comments, the audience was split into groups to discuss these same issues. Highlights of the benefits of the community included the Historic Downtown, Community Support and the Demographics of the Community. Some of the concerns noted included Better Wayfinding, a Stronger Industrial Base and a more diverse Business Community. The City will use this information to develop programs to address the concerns and highlight the benefits. For more information on this program or the City of Cedarburg, contact:

Mary Sheffield at msheffield@ci.cedarburg.wi.us



Snapshot of Current OED Projects

OED continues to work on financing packages with local businesses. Recently, OED has been involved in two local business expansions.

Oldenburg Metal Tech, a manufacturer of stamping tools and complex machined parts in the Town of Port Washington had outgrown its space. After considering options at their site or near the site, it became obvious that the company was going to have to leave. At the same time, Gen Mach, a Saukville manufacturer was looking to sell their business and property. This became an ideal match for Oldenburg, allowing them to expand their space, acquire new machinery and add new employees. As part of the project, OED worked with Oldenburg and their lender, Port Washington State Bank, to develop a package including a Revolving Loan from Ozaukee County, a low-interest loan from Saukville and conventional financing from their lender. This package kept the entire project within budget and through low interest loans, allowed Oldenburg more money to use for their continuing expansion.

Core Consulting offers key engineering services to industrial manufacturers from throughout the region. Core Consulting through significant growth over the past three years was looking to expand their headquarters. With a commitment to locating within the Village of Thiensville, its partners were able to find a new space in the downtown. OED worked with Core's partners as they set up a new LLC to purchase 107 W. Buntrock and create their new office space there. OED developed a package with the new LLC, and their lender, Johnson Bank utilizing the County's Revolving Loan Fund program. The company purchased the property this spring and moved in over the summer. Matthew Buerosse, partner at Core, stated "the process was quick and easy, no different from conventional financing, actually this was easier."

**These are just two of the projects OED has assisted with, let your business be the next.
Contact Kathleen Cady Schilling for more information at 262.238.7730 or kschilling@co.ozaukee.wi.us**

LONG Program Graduates 2nd Class of Promising Leaders

Fourteen professionals who live and work throughout Ozaukee County earned Leadership Professional Certificates on August 20th as part of the 2013-2014 class of Leaders for Ozaukee's Next Generation (LONG). The nine-session leadership development program, now in its second year, is a collaborative effort of Ozaukee County UW-Extension, Ozaukee Economic Development, local Chambers of Commerce and UWM's Small Business Development Center to build leadership capacity in Ozaukee's communities and workplaces.

Over the course of the program, participants learn about key aspects of leadership including effective communication, emotional intelligence, diversity training, and building community partnerships. They also work collaboratively on community-based team projects. This year's class continued the work of two projects for the 2012-2013 LONG program and started two new projects.

The Ozaukee Professional Excellence Network (OPEN) team of Joel Deutmeyer, Jodi Conrad, Donna Skwierawski and Jeanne Mueller held its second annual networking program for Ozaukee professionals on May 20th at the Milwaukee Ale House with over 50 attendees.

Bob Markoutz and Kay-Ella Dee partnered with Riveredge Nature Center and the YMCA to put on the first annual Sugar Dragon Scurry, a snowshoe and winter hike on February 9th that attracted 50 participants with a variety of family-friendly activities.

The Friends of Lion's Den Gorge team of Tom Mongoven, Dave Schegel and Brian Immel held a beach cleanup at Lion's Den Gorge Nature Preserve on April 19th, collecting 46 pounds of garbage.

Kris Barger, Tom Oliver, Jennifer Mantooth and Tiffany Sheperd developed a marketing strategy to bring awareness to the programs and services available through Ozaukee Family Services and provided informational materials about the organization at several community events.

For more information contact Kate Pawasarat at kpawasarat@co.ozaukee.wi.us

The United Way Of Northern Ozaukee

Did you know that the United Way has a small local chapter in the northern part of the county?

The United Way of Northern Ozaukee has come a long way since its origin in 1950 as a United Way Red Feather Agency Community Chest. UWNO's original founders were Ozaukee Business leaders who shared a vision of financially supporting programs that provide health and social services to the citizens of our County. This continues UWNO's mission today.

UWNO currently funds 17 programs and 16 agencies serving residents throughout Ozaukee County. We are working collaboratively on health, education and income initiatives with our partner agencies including: Advocates, Balance, Big Brothers Big Sisters, Ozaukee Jail Literacy, Ozaukee Family Services, Portal Inc., Starting Point of Ozaukee, Cope Services, Interfaith Caregivers of Ozaukee County, Ozaukee Circle of Friends, Volunteer Center of Ozaukee County, American Red Cross, Family Sharing of Ozaukee, Salvation Army, Bay Lakes Council Boy Scouts and Girl Scouts of Manitowoc Council.

United Way of Northern Ozaukee involves itself in the county in more than just grants. Our hands on approach includes:

- Providing Leadership to help the 21.8%, who are the working poor in the county and can barely make ends meet.
- Working with law enforcement, citizens, and business leaders to talk about substance abuse and mental health issues.
- Working to form a coalition for mobilizing the community around transportation and access to health care initiatives.

UWNO's challenge lies in the fact that over 50% of our community commutes outside the county to work. This means that they might not be listed on your pledge cards people receive at work. **If you want to make a difference in Ozaukee county and have your funds managed locally, you must write "United Way of Northern Ozaukee County" on the write-in pledge line on the pledge form.**

For more information about UWNO, please go to their website www.unitedwayno.org.