



**As of 1/8/18**

## FINANCIAL POISE WEBINAR ONE SHEET PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP 2018

**ALL TIMES ARE 3 PM CT**

#1 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	Welcome to the Team! Recruiting and Hiring, Including Restrictive Covenants	1/23/2018	Aaron Gelb	David N. Michael	Jennifer Marszalek	
#2 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	An Ounce of Prevention: Policies, Procedures and Proactivity	2/20/2018	Aaron Gelb	Jeralyn Baran	Jodi Eisenstadt	Paul Clinkscapes
#3 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	Show Them the Money: Wage & Hour Compliance	3/20/2018	Aaron Gelb	Phillip Schreiber	Jason Klimpl	Charles Krugel
#4 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	Time for a Break: Managing Leaves of Absence and Accommodating Disabilities	4/17/2018	Aaron Gelb	Charles Krugel		



#5 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	I Know What You Did Last Summer: Workplace Investigations	5/15/2018	Aaron Gelb	Rachel Ablin	Charles Krugel	Jennifer Marszalek
#6 PROTECTING YOUR EMPLOYEE ASSETS: THE LIFE CYCLE OF THE EMPLOYMENT RELATIONSHIP	It's So Hard To Say Goodbye: Minimizing Risk When Terminating Employees	6/19/2018	Aaron Gelb	Laura Liss	Charles Krugel	Jennifer Marszalek

**FINANCIAL POISE CONTACT**

Cristina Nolan

[cnolan@financialpoise.com](mailto:cnolan@financialpoise.com)

**MODERATOR**

Aaron Gelb, Partner  
Conn Maciel Carey LLP, Chicago

[agelb@connmaciel.com](mailto:agelb@connmaciel.com)

**PANELISTS**

Rachel Ablin, Founder  
Ablin Law, P.C., Chicago

[rachel@ablinlaw.com](mailto:rachel@ablinlaw.com)

Jeralyn H. Baran, Principal  
Chuhak & Tecson, P.C., Chicago

[jbaran@chuhak.com](mailto:jbaran@chuhak.com)

Paul Clinkscapes, CFO, Director/Part owner  
Sunburst Digital Inc., Chicago

[pac.cpa@sbcglobal.net](mailto:pac.cpa@sbcglobal.net)

Jodi Eisenstadt, President  
Eisen Alliance, Chicago

[jodi@eisenalliance.com](mailto:jodi@eisenalliance.com)



Jason B. Klimpl, Partner  
Tannenbaum Helpern  
Syracuse & Hirschtritt LLP, NY

[klimpl@thsh.com](mailto:klimpl@thsh.com)

Charles A. Krugel  
Law Offices of Charles Krugel  
Chicago

[cak1@charlesakrugel.com](mailto:cak1@charlesakrugel.com)

Laura Liss, Partner  
Patzik, Frank & Samotny Ltd., Chicago

[lsiss@pfs-law.com](mailto:lsiss@pfs-law.com)

Jennifer Marszalek, Chief Talent Officer  
Havas Chicago Village/Havas, Chicago

[Jen.mars@havas.com](mailto:Jen.mars@havas.com)

David N. Michael, Partner  
Gould & Ratner, Chicago

[DMichael@gouldratner.com](mailto:DMichael@gouldratner.com)

Phillip Schreiber, Partner  
Holland & Knight, Chicago

[phillip.schreiber@hklaw.com](mailto:phillip.schreiber@hklaw.com)

### **About This Series**

If you have employees or advise companies with employees, this webinar series is for you! No employer—whether large, medium or small—is immune from the reach of federal, state and/or local employment laws and regulations. Now, more than ever, employers should consider taking a proactive approach to auditing their employment practices and policies so that they can better respond when issues arise. This webinar series approaches the employer-employee relationship from beginning to end, with programs covering the most important steps along the way, including hiring and onboarding, policy and procedure development and training, wage and hour compliance, accommodating disabled employees, conducting investigations and considerations associated with ending the relationship.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed

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to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes, so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.

### **About Episode #1**

#### **Welcome to the Team! Recruiting and Hiring, Including Restrictive Covenants**

January 23, 2018 at 3:00 PM CST

You only get one chance to make a first impression, so you want to make sure you're your company avoids unnecessary missteps when recruiting and hiring employees. Understanding what you can and cannot say during interviews and how to respond when a candidate volunteers information that may be considered "off limits" is essential. At the same time, there are a host of laws being passed throughout the country that address when and what sort of information you can request from applicants regarding their criminal and financial histories. In the event you decide to protect your organization by requiring certain employees to sign some type of restrictive covenants—non-competition, non-solicitation and/or non-disclosure—there are a host of legal and practical issues to consider. This webinar explores these and other issues so that you can be confident, going forward, that you are starting off on the right foot—legally, at least—when you hire new employees.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

### **About Episode #2**

#### **An Ounce of Prevention: Policies, Procedures and Proactivity**

February 20, 2018 at 3:00 PM CST

Kicking the can down the road is rarely a good idea, particularly when it comes to spending the time (and money) to develop a set of policies and procedures that will cover your workplace. While downloading handbook from the internet for a nominal fee, may sound like a good idea, you generally get what you pay for as one-size-fits-all solutions are rarely as effective as solutions tailored to your needs. What makes the most sense for your organization? What policies are must-haves? What are the latest best practices when it comes to employee handbooks? What about training your staff and your managers? This webinar presents practical advice for employers looking to put themselves in the best position possible to not only defend against employment-related claims but—hopefully—to help avoid them in the first place.



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### **About Episode #3**

#### **Show Them the Money: Wage & Hour Compliance**

March 20, 2018 at 3:00 PM CST

Compliance with federal (as well as state) wage and hour laws returned to the forefront towards the end of the Obama administration when it appeared that the salary threshold that applied to exempt employees would be increased significantly. While the proposed change will not happen, the Trump administration has signaled that the threshold will nonetheless likely increase. Regardless of where the new threshold lands, employers must nonetheless be mindful of the risks posed by misclassifying individuals as exempt as well as by a host of practices that can imperil otherwise proper classification decisions. And while the federal government is no longer scrutinizing the use of independent contractors as closely today, employers must still be careful when relying on contractors. This webinar delves into the mistakes commonly made by employers and endeavors to provide attendees with the tools needed to help find and fix potential wage and hour pitfalls.

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### **About Episode #4**

#### **Time for a Break: Managing Leaves of Absence and Accommodating Disabilities**

April 17, 2018 at 3:00 PM CST

Your business likely functions more effectively when your employees are at work doing the work you hired them to perform? What are your rights (and obligations) as an employer when an employee is unable to work due to an illness or injury? Does the Family and Medical Leave Act apply? Do you operate in a jurisdiction that has recently enacted a sick leave law? What happens when an employee requests a reasonable accommodation because of a disability? These types of questions have been confounding employers for years and are likely to grow more complicated as state and local governments step in to fill the voids left at the federal level. Do not despair, though, as this webinar includes discussions of the mistakes commonly made by employers as well as a series of tips and pointers from a panel of experts who will help you navigate these and other thorny issues involving employees who are unable to work for health-related reasons.



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### **About Episode #5**

#### **I Know What You Did Last Summer: Workplace Investigations**

May 15, 2018 at 3:00 PM CST

Now, more than ever, employers must be prepared to promptly and effectively respond to complaints of workplace harassment and/or discrimination. Often, that requires knowing when and how to conduct an internal investigation. Given the significance of the issues often at stake and the potential for a negative outcome (attorneys' fees, high dollar settlement, negative PR), learning on the fly is not a viable option when undertaking an investigation. This program covers a host of questions, including what sort of issues should be investigated, who should conduct the investigation, what steps should you take and in what order, who should be interviewed, what sort of documents should be created and how do you close out the investigation? It also explores the investigation process and provides guidance from a seasoned investigator as to how to handle the many issues that you will often confront during the course of an investigation.

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### **About Episode #6**

#### **It's So Hard To Say Goodbye: Minimizing Risk When Terminating Employees**

June 19, 2018 at 3:00 PM CST

Involuntary terminations are never pleasant, but they are an inevitable part of business. Whether an employee is being let go due to poor performance or serious misconduct, chances are that he or she may take issue with the company's decision—either during the termination meeting or at some point down the road. In the event the terminated employee decides to visit the nearest Equal Employment Opportunity Commission Office or meet with a plaintiff's attorney, you want to make sure that you have taken steps to minimize risk and give your organization its best chance to defend against claims of discrimination, retaliation and/or wrongful discharge. This webinar discusses the various issues you should consider not only when you are making the decision to



terminate but also in the weeks and months that lead up to that point. Drawing on their experiences as an HR consultant and management-side employment lawyer, the panelists provide practical tips to minimize exposure and best practices for conducting an employee termination meeting.

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