



Ten Leaders To Know



KELLY BARRICK



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BRAD NIELSEN



STACEY PELLETT



SCOTT PETERSON



OFELIA RUMBO



DUSKY TERRY



MARGUERITE TOMLIN



MINDI VANDEN BOSCH

Welcome to the August edition of ABI's Business Monthly, where we are highlighting Ten Leaders to Know. These individuals, both young professionals and more tenured, were chosen from ABI member companies and embody the values of integrity, empathy, vision, resilience, and ingenuity. The values of a good leader are essential guiding principles that shape their behavior, decisions, and interactions with others. These values not only define the leader's character but also influence the culture of the organization or community they lead.

Iowa's diverse landscapes and close-knit communities have provided fertile

ground for the growth of exceptional leaders, and this publication gives readers a glimpse into the stories of ten individuals that are making a significant difference every day in the state of Iowa. As we highlight these individuals, may their stories ignite a flame of ambition within each reader, inspiring us all to become creators of positive change and lead with purpose and compassion. Let Ten Leaders to Know be a source of motivation and a testament to the potential of leadership in shaping the destiny of a state and the lives of its people.

STORY ON PAGE 10

CALENDAR OF EVENTS

2023

AUGUST 28 Executive Open WEST DES MOINES

AUGUST 29 Economic Growth Public Policy Meeting DES MOINES

AUGUST 30 Tax Public Policy Meeting DES MOINES

AUGUST 31 Automation Summit NEWTON

SEPTEMBER 13 What's the Future of the Economy? WEST DES MOINES

OCTOBER 4 Iowa Manufacturing Conference and Legends in Manufacturing Awards ANKENY

2024

JANUARY 10 Legislative Briefing and Reception DES MOINES

VISIT WWW.IOWAABI.ORG AND CLICK THE "EVENTS" TAB FOR DETAILS ON ALL UPCOMING EVENTS.

You can read full profiles of ABI's 2023 Ten Leaders to Know at www.iowaabi.org.

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COVER STORY FROM PAGE 9

# Ten Leaders To Know

## Kelly Barrick

Managing Director,  
CIBC Mid-Corporate

Hometown: Halbur, IA  
Residence: Johnston, IA

### What excites you the most about the business you work in?

What really gets me excited about banking is the chance to collaborate and form genuine connections with the businesses in each community. It goes beyond just a transaction for me. I love hearing the stories of the founders and learning about the strategic goals of the management team. It's about more than the business; it's about the people and the relationships. I enjoy listening to what's working well for them and figuring out how I can fit in to truly be a valuable part of their team. As their trusted advisor, it brings me great joy to help them with financing while also collaborating alongside of them to refer other business experts who will also support them in achieving their ambitions.

### What do you see as the next big trend in your industry?

While I expect the future will remain rooted in solid relationships, I also expect we will see an increase in AI and technology advancements. Each will continue to push our industry in new ways to provide customers with even better seamless on and off-online experiences, and innovative deal structures/products.



### Where do you look for inspiration or to generate new ideas?

I primarily rely on networking, people interaction helps me thrive! The great events put on by ABI around the state, and on-site-tours of my clients' businesses are examples of this inspiration. These relationships allow me to gain valuable perspectives that tend to spark innovative ideas.

### What does effective leadership mean to you?

An effective leader communicates well, motivates the team and provides a clear vision, empowering each team member in his/her role to find a successful path.

## Rob Feeney

CEO, Atlantic Coca-Cola Bottling Co.

Hometown: Atlanta, GA  
Residence: Des Moines, IA

### How did you get where you are today?

I was recruited to Atlantic Coca-Cola Bottling Co. to lead all aspects of our company's territory acquisition and corresponding business integration efforts in 2016, which expanded the business 4x. Prior to joining Atlantic, I spent a number of years in NYC as Director and Head of Operations for Garrison Investment Group (\$4.2bn alternative asset management firm). Prior to Garrison, I was Chicago-based as a Vice President at Bank of America Merrill Lynch within their securitization team. I started my career in Chicago at Mercer Consulting as an analyst. I received a BS in Applied Mathematics from the University of Michigan.

### What do you see as the next big trend in your industry?

On the distribution side of our business, there will be continued investment in automation – from warehouses to predictive ordering capabilities. We have just completed a warehouse automation project in our Des Moines facility which has allowed us to streamline many aspects of our order fulfillment process. This technology allows for greater throughput, accuracy, and improved ergonomics for our colleagues in warehouse fulfillment roles. As technology and data sharing increases (across



suppliers, warehouse systems, customers, etc.), there will also be a greater opportunity for predictive replenishment orders within supply chain systems, along with a huge increase in accuracy and traceability (e.g. block chain adoption).

On the beverage side of the business, trends continue to evolve quickly. We are blessed with a portfolio which spans from Coca-Cola and Sprite to Smartwater, VitaminWater, Fresca, Gold Peak Tea, Powerade, BODYARMOR, Monster Energy... Looking ahead, I think the historical category lines will continue to blur as new beverage innovation is introduced. I also think packaging innovation could be a key driver for growth.

### What is your favorite thing about Iowa?

If you are willing to donate the time, there is the ability to make a meaningful impact in your community.

### What piece of advice would you give your younger self?

Do not let your kids convince you to get a dog... you will end up taking care of it.

## Casey Mills

Principal, Mills-Shellhammer-Puetz & Associates

Hometown: Sioux City, IA  
Residence: Sioux City, IA

### How did you get where you are today?

After graduating from the University of Nebraska, I pursued my passion for public policy and worked for Senator Grassley, first in DC and then on his re-election campaign. As most Iowans know, politics never stops. And with activity for the 2012 Iowa Caucus picking up immediately after the 2010 election, I took a role as the communications director with the Republican Party of Iowa.

While I thoroughly enjoyed my time working in politics, I had always wanted to perpetuate our family business and decided to pursue my MBA at Northwestern's Kellogg School of Business. After completing my MBA, I worked as a management consultant for Accenture Strategy in Chicago for 3 years before returning home to Sioux City to work at our family's insurance agency, Mills-Shellhammer-Puetz & Associates.

### What excites you the most about the business you work in?

Two things come to mind. First, there is a considerable amount of texture day-to-day in the insurance industry. You get exposure to many different industries and people. No two days are the same.

Second, I consider it an honor to work with my father every day. He started the

agency as the lone agent with one account manager nearly thirty years ago and continued to build the agency over time. He's certainly my mentor but also someone I look up to as a person who took the risk to go hang their own shingle and grow something from the ground up.



### Where do you look for inspiration or to generate new ideas?

My clients. Siouxland has always had an impressive group of business leaders and entrepreneurs and it has always been a priority of this agency to be active in the business community. As I alluded to before, you get broad exposure to different industries in the insurance, but you also have access to a diverse group of leaders.

Beyond that, I have worked to maintain my business school network and often seek the advice of my former classmates, whether that be through ways to grow our business or ways to grow professionally.

### What is your favorite thing about Iowa?

Prior to moving back to Iowa, we lived in downtown Chicago. There is no shortage of things to do in Chicago, but I wouldn't trade the opportunities we have in Iowa. We can play catch in the backyard, be at all of our kids' activities without fighting traffic and enjoy a sense of community you won't find in a large city.

## Brad Nielsen

Vice President, Operations,  
Iowa American Water

Hometown: Champaign, IL  
Residence: Davenport, IA

### What excites you the most about the business you work in?

Developing strategy and strategic thinking gets me excited. In any utility you are dealing with long asset lives requiring constant renewal. Specifically in the water/wastewater utility industry, most infrastructure we are installing will outlive everyone who is a part of the project. My team and I always try to look to the future so our customers and the next group of leaders sitting in our offices will have a better system because we were strategic in our approach.

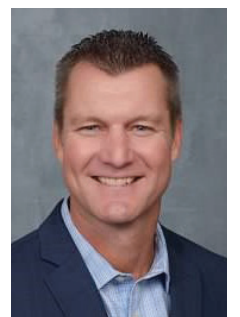
### What do you see as the next big trend in your industry?

Like most industries, I see workforce planning and automation as key trends. We have great people with long tenures on our team. As we face key retirements, we want to be as prepared as possible. Technology continues to take big steps forward and it's exciting to see what's going to be possible.

### Where do you look for inspiration or to generate new ideas?

I love to talk about business, regardless of what industry someone is in. I have and have had some great mentors in my career which is very helpful resource. The collabo-

ration of my team at all levels has been produced some really great new ideas as well.



### What does effective leadership mean to you?

Effective leadership means a focus on improvement each and every day. Whether it's developing your team to the next level, positively impacting customer experience, not being afraid of making mistakes, challenging the status quo of how we are operating today, or just being a better human being. I believe being an effective leader is a journey, not a finish line, and all of those aspects should be focus points.

### What piece of advice would you give your younger self?

Stretch yourself even if you think you aren't ready, but never lose sight of the most important things in life. Keep those things in perspective as you climb the ladder.

### As a business leader, what book would you recommend for personal or professional growth?

There are so many great resources out there. The book that has impacted me the most was Creativity, Inc. by Ed Catmull. I discovered that book at a time when the message couldn't have been more important for me to hear. I'm currently reading The Obstacle is the Way by Ryan Holliday which has interested me as well.



## Stacey Pellett

Manager, State Public Affairs,  
John Deere

Hometown: Orange County, CA  
Residence: Atlantic, IA

### How did you get where you are today?

The road to today has been filled with accomplishing many things I swore I would NEVER do. I have a degree from Texas A&M University in Ag Business and an MBA from Texas Tech University in International Business- so I thought the world was my oyster. Upon graduating college, I developed a written list of things I promised myself I would never do, including teaching for a living, leaving Texas or marrying a farmer. All three, as well as the other seven on that list, have been the best choices I've made.

More than 3/4 of my almost 25 years at Deere have been in some sort of educational capacity. I absolutely love living in Iowa and marrying my farmer was my smartest decision. I have had several roles during my career that were far outside my comfort zone of knowledge or expertise - but those have been the ones that have enabled me to really grow. I didn't plan this road but have really loved the journey in getting here!

### What excites you the most about the business you work in?

Agriculture is such an exciting industry right now. It is evolving rapidly with innovations in automation, autonomy, precision farming capabilities and seed genetics. The demand to not only feed the world, but do so in a sustainable manner, continues to grow exponentially each year. These advancements enable producers to yield more on the same amount of land, while simultaneously reducing water, chemical and fertilizer. Applying exactly what each individual plant needs, when it needs it and in



a manner that ensures optimal nutrient uptake, while not overapplying unnecessary product, is a win-win for the producer, the environment and ultimately the consumer. This is a very high-tech, dynamic and progressive industry and I can't imagine being involved in anything else.

### What does effective leadership mean to you?

Leadership can come in many forms. Someone who is positive, strives for excellence and inspires others is a leader. Additionally, individuals who are humble, serve others, and exude honesty and transparency are also leaders. Everyone has the opportunity to be a leader in whatever situation they find themselves in. Whether it's being the loudest cheerleader in the dugout, the captain of the team on the field, the quiet encourager in the office or the hardest worker in the pack - leadership is a choice. But it's important to also remember if others aren't following you, then you aren't leading - you're on a solo walk. Each of us have gifts that we can utilize to be a leader. I am inspired by people who both utilize their talents to lead, but also are humble enough to be willing to be led. As a leader, this is who I strive to be.

## Scott Peterson

CEO, Interstates

Hometown: Beresford, SD  
Residence: Sioux Falls, SD

### What excites you the most about the business you work in?

Interstates has a rich history of adding new services and offerings as a way to solve problems for our clients. We will continue to do that in the next years by focusing on industrialization and digitization.

As we all know, we just went through a disruption with the pandemic and supply chain issues. We are set to have another disruption related to industrialization and digitization, and we have an opportunity to lead clients and the industry to successfully navigate those challenges and opportunities.

From our company perspective, we continue to grow and add great talent. Our culture keeps getting stronger because of our continual focus on investing in our people and providing opportunities for them. It's also because our people live out the Interstates Core.

### Where do you look for inspiration or to generate new ideas?

There are so many places to look! One way is to be active with our association memberships (like ABI), to find peer groups within our industry, attend speaker events, read books and articles, and listen to podcasts - there are some great options out there.

### What does effective leadership mean to you?

Effective leadership is about leveraging the talent around you so that others can succeed.



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### Ofelia Rumbo

Human Resources  
Director,  
Merrill Manufacturing

Hometown: San Pedro Del Gallo, Durango Mexico  
Residence: Storm Lake, IA

#### How did you get where you are today?

Through hard work and determination and with the help of a great support system; family, friends, colleagues, mentors, and others. I would not be here today if it wasn't for those who have believed in me and challenged me to work at my greatest potential.

#### What excites you the most about the business you work in?

Manufacturing plays such a pivotal role in our economy and is constantly evolving. I get excited about where the industry has been and where it is going. I'm particularly proud to work for Merrill Manufacturing. For almost 75 years, Merrill has provided job opportunities, ignited creativity and innovation, and fostered economic growth in the Storm Lake area while serving many customers across the globe.

#### What do you see as the next big trend in your industry?

I think the next big thing will continue to be robotics for human augmentation. I look forward to improved future technologies that will continue to aid us humans in doing less demanding physical work while increasing productivity.

#### Where do you look for inspiration or to generate new ideas?

I get inspired by my children. I often think of what the future could look like for them. Every time I need to generate new ideas, I ask myself, "wouldn't it be cool if?" It seems to work!



### Dusky Terry

President, ITC Midwest

Hometown: Story City, IA  
Residence: Earlham, IA

#### How did you get where you are today?

I got here through a lot of hard work, a few great mentors, and a little luck along the way.

#### What excites you the most about the business you work in?

These are extraordinary times. To be part of one of the most stable yet rapidly changing systems in the world – the electric grid – is fascinating to me. It feeds my desire to continue learning, growing, and solving problems.

#### What is your favorite thing about Iowa?

The people. Iowans are like no other.

#### Why are you a member of ABI?

ABI provides a unified voice for Iowa businesses, a network of business leaders, and opportunities for professional growth and development.

### Marguerite Tomlin

Internal Communications  
Specialist, Arconic

Hometown: Davenport, IA  
Residence: Bettendorf, IA

#### How did you get where you are today?

I got to where I am today with a combination of luck and hard work.

#### Where do you look for inspiration or to generate new ideas?

I'm always on the lookout for inspiration. One of the best pieces of advice I've received is, "when you're thinking over a problem, get up from your desk, go outside, go for a walk, get out in nature – do something other than just sit. It will help change the way you think about a problem." So, I typically do that to find inspiration. I also really enjoy talking over an idea with others, particularly those outside my industry. It's amazing how hearing a different perspective will generate a completely new idea.

#### What does effective leadership mean to you?

Effective leadership means caring about and reaching employees in a way that works best for them. No matter what industry you're in, you're only as good as the employees who work for you. If you want to be an effective leader, that means communicating with employees in a way they understand, providing the critical information and feedback they need, and motivating them in a way that suits them to help them perform their best.

#### What piece of advice would you give your younger self?

I wish I could give myself the advice, networking is not as scary as you think!



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## Mindi Vanden Bosch

Vice President, Operations,  
Vermeer Corporation

Hometown: Omaha, NE  
Residence: Pella, IA

### How did you get where you are today?

I grew up playing sports and understanding the importance of a team and how working together will drive success. I also had so many great mentors throughout my career that helped me navigate decisions and understand where I get energized.

I have worked in many different areas in business, but my passion pulled me back to Operations. I started out in Continuous Improvement and the desire to drive waste out of a process has been something that has also been a focus for me over my career.

### What do you see as the next big trend in your industry?

Being in operations, I think we will all need to start understanding how the challenges with labor and supply chain will continue to be a challenge in the future. We have some automation in our plants, but I think we need to continue to focus on how technology can continue to support our team throughout the manufacturing process.

### What excites you the most about the business you work in?

Vermeer is a company that spans many different markets and countries around the world. It is awesome to be part of such a great organization that has products that make a difference in the world.

Vermeer was built on a foundation of innovation, taking care of the customer and re-



spect for our employees. That culture is still strong today and it is great to work for an organization that has that foundation.

We have been on the lean journey for 25 years and that drive for continuous improvement is also part of our culture.

I have a lot of pride watching Vermeer machines get built and roll off the assembly line.

### What piece of advice would you give your younger self?

I would tell myself to be patient in my career journey. Everyone wants to move roles and move up quickly. Every role I have had over my career has helped build the foundation of knowledge. Enjoy the journey.

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## ABI FOUNDATION:

# Iowa Young Professionals Invited to Annual Conference on Aug. 25

Here in Iowa, we are embarking on a new era of progress and innovation, powered by the indispensable contributions of our young professionals. These talented individuals are entering and making waves in our workforce, infusing fresh perspectives into every industry, and driving transformative growth and sustainable development.

Equally important is the radiating impact that our young professionals are making throughout Iowa outside of the workplace. Not only are they invigorating local initiatives and fostering a sense of unity – but their presence is key to ensuring that cities and regions across our state, both rural and urban, continue to thrive as welcoming, vibrant communities, full of opportunities for both new and lifelong citizens.

Iowa young professionals are speaking up and raising their hands with a desire to create positive change, and one of the best opportunities we have is to listen.

One way in which young professionals are fostering a culture of community across Iowa is through young professional organizations. These may be cultivated through local chambers or other established organizations, or simply by way of individual efforts after recognizing a



need for emerging leaders to have more opportunities, peer support, and an organized way in which they can apply their skills and talents.

At ABI and with through our Foundation programs, we are all about developing Iowa's current and future leaders. In my time as Director of Programs for the ABI Foundation, I've been fortunate to be involved with many outside organizations that are complementary to the programs we run. One organization is Young professionals of Iowa.

This year, YP Iowa, a nonprofit organization created to connect and support our state's young professionals and young professional organizations, will be hosting a one-day summit open to all Iowa young professionals. Attendees will be provided with opportunities to learn from other thought and industry leaders and gain valuable insight for per-

sonal and professional growth. They'll have the chance to attend informative sessions, participate in interactive workshops, and connect with peers from across the state.

Consider joining this exciting day, or sharing this opportunity with your local YP chapter or young leaders in your organization to ensure your community is represented:

- **When:** Friday, August 25; 9:00am-4:15pm
- **Where:** FFA Enrichment Center in Ankeny, Iowa
- **Cost:** \$85 (includes lunch and optional networking breakfast)
- **Who:** Typical YP age-range is considered 21-40, but all are welcome to join and learn. College student-leaders are also welcome.
- **To Register:** Visit [www.ypiowa.org/events](http://www.ypiowa.org/events) and click "Register Today" under the Annual Conference details.

Join us in embracing and fostering the boundless potential of our state's young professionals. By doing so, our state gains a dynamic force, propelling Iowa toward a prosperous future driven by the tenacity and ingenuity of our emerging leaders. ABI



**Jessi McQuerrey**

Director of Programs  
ABI Foundation  
[jmcquerrey@iowaabi.org](mailto:jmcquerrey@iowaabi.org)

### REGISTER TODAY:



## CAPITOL BUSINESS:

# Who Do You Need to Know for Successful Public Policy Advocacy?

Since our founding 120 years ago, ABI has existed to promote the common interests of business in Iowa. This is especially true in the public policy arena.

Good public policy outcomes have two key ingredients. For the first ingredient, a strong, fact-based, public policy proposal must be developed, with real-world implications for change. The second ingredient is access to the folks in the executive and legislative branches that will initiate consideration and vote to adopt ABI policy proposals.

This month and next, ABI will be tending to the first ingredient by convening our public policy committees to develop positions on public policy, consider that output through our legislative committee for recommendations to the ABI board. Ultimately, the ABI board then decides what issues are ready to advance by designating policy priorities for 2024.

It is in the development of the second ingredient that we must ask and answer the question - **Who Do You Need to Know for Successful Public Policy Advocacy?** ABI answers that question through programming we have developed for members,

and your public policy staff cannot stress enough the importance of membership participation in these opportunities.

As you read this, August public policy Committee meetings are underway, but you can still get involved in the meetings that remain at the end of August. In these meetings you can get to know cabinet level members of the Reynolds Administration, who will make presentations on their role and their department's mission for Iowa. These individuals will also be seeking input from ABI members as they make presentations and take feedback from ABI members at the start of these meetings.

In January, all legislators and key executive branch representatives are invited to attend the ABI Legislative Briefing and Reception. This is a great moment to meet with your legislator and get to know better as the 2024 session is just starting. Learn about their priorities and to share a bit about your company, your role, and the parts of the ABI agenda important to you.

In March you can get to know legislative leaders better by attending ABI's Business Day in Des

Moines. House and Senate leaders from both political parties give updates on their priorities and the prognosis on ABI priorities in real time.

As you can see there is plenty of ABI programming to help you meet the people you need to know in Iowa public policy. But the most important people you can meet live right in your area. They are your own House and Senate members, and they want to meet you too. They are eager to understand their districts as well as possible and that means knowing the employers in their area. Legislators enjoy facility tours, are available for coffee meetings and really appreciate emails from local interests.

If you would like assistance in a meeting with your local legislative leaders, please drop your ABI public policy team an email. JD Davis can be reached at [jddavis@iowaabi.org](mailto:jddavis@iowaabi.org) and Brad Hartkopf at [bhartkopf@iowaabi.org](mailto:bhartkopf@iowaabi.org).

We will set up introductions and meetings and attend if you would like. We hope you take us up on this offer. It will help promote the common interest of the ABI membership! ABI



**JD Davis**

Vice President of Public Policy  
ABI  
[jddavis@iowaabi.org](mailto:jddavis@iowaabi.org)

# Q and A: Prioritizing Healthcare



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## What Is Executive Health?

Executive health helps business leaders carve time out of their busy schedules to prioritize healthcare so they can be their best selves.

When you're in charge of an organization, it's easy to get caught up in your work. There are a lot of people depending on you in the workplace and often-times at home. It's all too easy to put off doctor's appointments, especially when you're feeling healthy. Executive health programs are designed to help business leaders take charge of their health in a minimal amount of time.

## How does executive health works?

You may have heard of executive physicals. These are comprehensive annual exams that aim to identify signs of health problems in patients before symptoms occur. Executive health programs pair a comprehensive physical with other VIP services related to overall health and well-being.

While some executive health programs are multi-day events, the program at The Iowa Clinic is designed to help business leaders across Iowa prioritize their health in a single day. This means that you can address all your health concerns and needs in less time than a typical workday.

## What are the advantages of the Executive Health Program at The Iowa Clinic?

The goal is to streamline comprehensive healthcare without sacrificing quality. This means all of your necessary appointments and testing are efficiently coordinated and fit into a single day at our West Des Moines campus. You will get a detailed agenda of your day and personal assistance from an executive health coordinator. You also will receive one-on-one, private access to the executive health physician of your choice. Over the course of six to seven hours, you'll learn more about your health than you've possibly ever known before. And if there is a need for fol-

low-up testing or a desire for additional services and consultation, The Iowa Clinic's executive health team will help you get those scheduled.

## What does a Five-Star Care custom-tailored comprehensive health program provide to patients?

The executive health program is very high touch, like a concierge feel. We work on getting those medical records ahead of time. And we coordinate the whole program for our patients. There's someone greeting you at the door the moment you show up. Your executive health coordinator will take you to appointments, there's a special suite that you'll have all to yourself. You're not spending time sitting around in waiting rooms. At The Iowa Clinic we understand privacy is important to everyone and that's especially true for executives and high-level employees in a community like Des Moines. You don't have to worry about encountering people you know or who might recognize you based on your position. Everything is confidential and The Iowa Clinic works to avoid overlap in appointments.

## What are the perks of the Executive Health Program for the patient?

Your pressing health needs come first, but an executive health program like the one at The Iowa Clinic also emphasizes comfort throughout the process. Executive-level perks include:

- Concierge service from your executive health coordinator.
- Private lounge for relaxation between appointments.
- Private business office with secure internet access.
- Healthy meals catered for breakfast and lunch, plus refreshments.
- Entertainment area (includes TV, magazines, newspapers and a sofa).
- Secure area to store any valuables you have with you.
- Private shower and dressing area with toiletries and a hairdryer.

Executive health program patients are also treated to a "menu of services"

that includes a list of complimentary well-being services to select from. Well-being services range from specialized one-on-one health consultations to more relaxing options like a Swedish massage session.

## What can a patient expect during my executive health exam?

Executive physicals begin at 7 a.m. by performing tests and the patient will meet their physician. The patient starts their day with a comprehensive lab panel and urinalysis. From there, the patient heads to cardiology for a vascular screening, then a hearing test is performed. A break is built in so that if any work or calls can be taken care of if necessary. Next, the patient will meet with the executive physician of their choosing, and the patient will spend approximately 45 minutes with them. During this time the patient will discuss their medical history with their physician and answer any questions the executive may have about their health.

Next, the patient will head down to medical imaging. Depending on the patient's age and gender, we'll run relevant tests. Examples include cardiac calcium scoring and bone density tests. The patient then returns to cardiology to do a stress echocardiogram.

After that there is some downtime for the patient to participate in a well-being activity of their choice. We give our patients a menu in advance with different well-being options. For instance, you can meet with a dietician or schedule time with a personal trainer. There's a massage room available in the executive suite if you choose a massage. Next, it's time for a healthy lunch.

While lunch is happening, behind the scenes we are compiling all the test results. The executive health program includes same-day test results. At 1 p.m. we'll provide the executive with a patient health report that goes in a binder.

The same physician the patient met with earlier will discuss results and recommendations for next steps. These may include things like behavioral changes, diet and exercise. The patient gets 30 to 35 minutes with their doctor where they can ask any questions that they have. If a patient has any urgent medical issues or needs further testing, our team will address those items.

## How does The Iowa Clinic select executive health doctors?

The majority of the executive health doctors at The Iowa Clinic are internal medicine physicians. They focus on healthcare for adults and have familiarity with diagnosing and treating a variety of medical conditions. They also can direct you to the right specialist on an as-needed basis. The physicians are interested in executive health and passionate about preventative care. Our executive health doctors go through a formal interview process, and we also gather peer recommendations. Satisfaction scores are another important part of the executive health program. The Iowa Clinic sends out a short, optional, three-minute survey to patients to complete after their exam.

We consistently have around a 95 percent satisfaction rating among patients and many of them recommend the program to other people. Everyone on the executive health team — from specialists to coordinators — are focused on delivering a five-star experience.

## Does insurance cover executive healthcare services?

Executive health is often considered to be a premium healthcare offering, so you'll need to check in with your insurance provider about coverage if you want to file a claim for your exam. There are several different options for how the executive physical exam for companies and individuals can be structured.

The Iowa Clinic's executive health department has dedicated team members who work with employers and individuals to discuss billing options and figure out the best solution.

## Experience executive health at The Iowa Clinic

Your time and health are important. The executive health program at The Iowa Clinic helps business leaders carve time out of their busy schedules to prioritize healthcare. An investment in your health is like an investment in your business. It pays off now and for years to come.

Call 515.875.9855 to request an appointment or access more information on our website. **ABI**



## WHAT'S TRENDING:

THE NEXT SUCCESSION TREND:  
Employee Stock Ownership Plans (ESOPs)

A significant part of America's wealth lies with family-owned businesses, with founders/owners reinvesting profits in the business.

Choosing to form an Employee Stock Ownership Plan, or ESOP, rather than selling the business outright, can help business owners leave a legacy and allow for the continuation of the current corporate strategy along with the current management team and employees. Since significant wealth may have been created through reinvestment, the founder/owner may be driven by a need to diversify wealth. With the greying Baby Boomer generation, ESOPs have become a mainstay and growing trend. In a PricewaterhouseCoopers 2010 study, approximately 10% of business owners chose an ESOP as an ownership transfer vehicle.

## What are ESOPs?

ESOPs originated in the 1950s but the use of ESOPs were expanded with the passage of the Employee Retirement Income Security Act of 1974 (ERISA). ESOPs have evolved but the purpose of an ESOP has generally remained the same. An ESOP is a qualified retirement plan, like a 401(k) plan, but is designed for investment primarily in the stock of the employer.

If a company's common equity is 100% owned by the ESOP and if the operating company is a S Corporation, the company may not be subject to federal (and most state) income taxes. The value created is taxed when distributed to participants when they leave the ESOP, at termination, death, retirement or disability. In addition,

ESOPs provide for diversification as the employee/participant approaches retirement.

## Why consider an ESOP?

The National Center for Employee Ownership (NCEO) has conducted studies that repeatedly show that ESOP-owned companies typically outperform their peers on multiple measures when combined with a high-achieving culture.

Wells Fargo has been providing commercial banking services to ESOP-owned companies since the advent of ERISA. Wells Fargo is a leading lender to ESOP-owned companies; currently serving over 600 ESOP clients. Wells Fargo specializes in supporting the financial needs of Iowa-based ESOP-owned companies at every stage of the business lifecycle through our local Commercial Banking team, while utilizing the experience and counsel of Wells Fargo's ESOP Advisory Team.

*Casey Cason, Senior Vice President, Iowa Commercial Banking Office, has 30 years of experience financing Iowa-based companies, including ESOP-owned companies. Cason can be reached at [casey.a.cason@wellsfargo.com](mailto:casey.a.cason@wellsfargo.com).*

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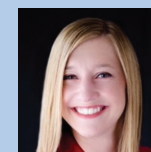
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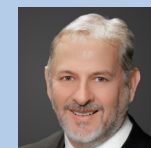
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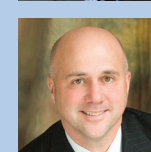
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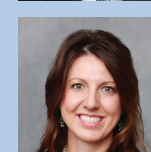
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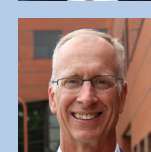
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*The Iowa Association of Business and Industry (ABI) has been the voice of Iowa business since 1903. Its mission is to provide a strong, unified voice to business and industry on issues affecting Iowa employers. ABI is comprised of member companies representing all industries and sizes in Iowa's 99 counties. ABI members employ more than 330,000 Iowans.*

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