



Firm Brochure
(Part 2A of Form ADV)

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This brochure provides information about the qualifications and business practices of ACCESS INVESTMENT ADVISORS, INC. If you have any questions about the contents of this brochure, please contact us by telephone at: (920) 683-9901, or by email at: mstokes@accessinvestmentadvisors.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

Additional information about ACCESS INVESTMENT ADVISORS, INC., is available on the SEC's website at www.adviserinfo.sec.gov

Material Changes

Annual Update

The Material Changes section of this brochure will be updated annually when material changes occur since the previous release of the Firm Brochure.

Material Changes since the Last Update

ACCESS's address has changed. See above. Access aggregates Client trades where appropriate (page 6).

December 31st, 2012

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Advisory Business

Firm Description. ACCESS INVESTMENT ADVISORS, INC. (“ACCESS”) was founded in 1995.

ACCESS provides financial planning and investment management services to individuals, pension and profit sharing plans, trusts, estates, and small businesses. Services include financial planning, investment advice, investment management and supervision, and project based consultation (a limited engagement of services).

ACCESS is a fee-only Financial Planning and Investment Management firm. It receives no compensation from any products placed on behalf of its Clients. ACCESS is not affiliated with entities that sell financial products or securities.

Investment advice is provided on an initial, and if requested, an on-going basis. ACCESS does not take custody of, or act as a custodian for Client assets. ACCESS places trades for Clients using discretionary authority granted under a Limited Power of Attorney (LPOA) agreement.

ACCESS provides a written evaluation of each Client's initial situation in the form of a financial plan, investment review, or in the case of a project based engagement, a set of recommendations. ACCESS provides periodic reviews with Clients who have requested on-going services. The number and timing of these reviews is based on Client preference and complexity of the Client's situation.

Ongoing asset management Clients are provided access to a secure internet site that contains their financial planning data and reports. This system provides daily updates for assets and liabilities that are linked to it.

Outside professionals (e.g., lawyers, accountants, insurance agents, etc.) may be engaged directly by the Client on an as-needed basis.

An initial meeting is free of charge to determine mutual interest in establishing a Client relationship and the scope of that engagement.

Principal Owners. William R. Casey is the sole shareholder of ACCESS

Types of Advisory Services. ACCESS provides financial planning services, investment advice, ongoing investment management (“Managed Accounts”), and supervisory services for accounts not held by its custodian(s) (“Supervised Investments”). As of December 31, 2012, ACCESS managed and/or supervised \$106,275,863 of assets for 120 Clients. All Assets in Managed Accounts are managed on a discretionary basis.

Individual Advice. ACCESS documents goals and objectives for each Client and reflects these in an *Investment Policy Statement* that describe a Client's risk tolerance (the emotional ability to take on risk) and risk capacity (the financial ability to take on risk). Clients may impose restrictions on investing in certain securities or types of securities. Client Agreements may not be assigned without Client consent.

Types of Agreements. The following agreements define typical Client relationships.

- **Financial Planning Agreement.** The Financial Planning Agreement details the services to be provided to the Client. A financial plan is designed to assist Clients in solving current financial problems and to develop strategies to achieve future goals. It may include initial investment observations, but does not provide ongoing investment management assistance. The financial plan may also include, but is not limited to the following: a net worth statement, an annual budget, a review of investment accounts (including review of existing investments and observations), strategic tax planning, a review and recommendations for retirement plans, a review and recommendations for life and health insurance policies, retirement planning strategies, goal funding strategies, education planning, and an estate plan review and recommendations.

ACCESS provides detailed recommendations to the Client as part of the financial plan. Implementation of the recommendations is at the discretion of the Client.

The fee for a financial plan is predicated upon the facts known at the onset of the engagement. The typical fee range for financial planning is \$1,500 to \$3,000 and is based on the complexity of the situation and the time and personnel required to complete and to deliver the initial financial plan. This fee is not negotiable.

After delivery of the financial plan, Clients may schedule additional meetings to request assistance in implementing recommendations. Follow-up by the staff of ACCESS to implement recommendations is billed separately at \$105 per hour. Any implementation expense will be fully disclosed and is approved by the Client prior to services being provided.

The Client determines if the financial planning engagement is to be done on a project based consulting basis, or on an ongoing basis. If the engagement is to be provided on an ongoing basis, ACCESS will schedule periodic reviews to monitor the progress of the plan and determine if any adjustments are necessary.

- **Asset Management Agreement.** A Client may select ACCESS to manage investment assets on an ongoing basis to provide continuity to his/her financial plan. Initial and ongoing investment recommendations are made to be consistent with the overall objectives of the Client and recommendations made in the financial planning process. Any changes in the Client's financial plan will be reflected by appropriate adjustments in the management of assets managed and/or supervised by ACCESS.

The scope of engagement and fee for asset management and/or supervision is provided to the Client in the form of the *Asset Management Agreement* which is executed prior to any asset management and/or asset supervision.

The annual asset management fee is determined by the amount of assets to be managed and/or supervised by Access. Fees for asset management and supervision are described in the Fees and Compensation section.

The minimum annual fee for new asset management Clients is \$5,000 and is not negotiable. Existing Client relationships may exist with fee structures higher or lower than the fee schedule described in this brochure.

- **Limited Engagement Agreement.** ACCESS provides hourly consulting services for Clients requesting a limited engagement of services. Fees for these services are described in the Fees and Compensation section.

Asset Management. Managed assets are typically invested in no-load mutual funds, exchange traded funds (ETF's), individual equities, individual fixed income investments, municipal securities, U. S. government securities, and/or private equity investments. An investment recommended by ACCESS may contain internal fees and expenses. These expenses are paid by the Client and are disclosed in the investment's prospectus or offering memorandum. In addition, the custodian(s) used by ACCESS to hold Client assets may charge transaction fees to purchase or sell investments recommended by ACCESS. Any of these costs are paid directly by the Client.

Managed assets may also include: separately managed accounts, warrants, corporate debt securities, commercial paper, certificates of deposit, variable annuities, options contracts, futures contracts, and interests in partnerships. Initial public offerings (IPOs) are not available through ACCESS.

Fees and Compensation

Description. ACCESS is compensated exclusively by its Clients. ACCESS does not receive compensation in any form from investment companies, brokerage firms or custodians.

ACCESS is compensated by hourly based fees and/or asset based fees paid by Clients as described in the Advisory Business section.

An advance payment (retainer) may be required to commence financial planning work.

Financial plans are priced according to the degree of complexity associated with the Client's situation.

Fees for financial planning and project based fees are billed at the following hourly rates: Advisor - \$210, Technical - \$105, Clerical - \$45.

For assets *directly managed* by Access (Managed Accounts), the annual fee schedule is as follows: 1.00% on the first \$2,000,000, .75% on the next \$1,000,000 (from \$2,000,001-\$3,000,000) and .5% for amounts over \$3,000,000. These assets are held at ACCESS' custodian(s) and are subject to the Limited Power of Attorney agreement for ongoing management.

For assets *not directly managed* by ACCESS (Supervised Investments), the annual fee is .5% for all Supervised Investments. These investments are typically "held away" assets not held at ACCESS' custodian(s) and not subject to the Limited Power of Attorney. Assets "held away" may be brought under the supervision of ACCESS for monitoring, recommendations, and consolidation in the overall investment strategy.

Fees are not negotiable.

Fee Billing and Payment. ACCESS levies asset management fees for Managed Accounts and Investment Supervision on a quarterly basis in advance, meaning that ACCESS invoices Clients and is paid at the beginning of each quarter. Fees for Managed Accounts and Investment Supervision are generally deducted from designated Client account(s) held at ACCESS' Custodian(s). Client consent is required for fee payment from any account(s).

Other Fees. Custodians may charge transaction fees for purchases or sales of mutual funds, exchange-traded funds, equity investments and fixed income investments among others. These transaction charges are typically incidental to the purchase or sale of a security. This cost is considered during investment selection; however, the quality and appropriateness of the investment for the Client in question is the primary consideration when making investment recommendations to Clients.

ACCESS may, at its discretion, waive its minimum fee and/or charge a lesser asset management fee based upon certain criteria (e.g., historical relationship, type of assets, anticipated future deposits, related accounts, account composition, etc.).

Internal Investment Expenses. Investments selected by ACCESS may contain internal expenses associated with them. Mutual funds generally charge management fees for services provided as investment managers. This management fee, along with other related costs is called the expense ratio. Other types of investments, and investment managers, may have internal expenses related to the management of the investment. All internal expenses are disclosed in the investment prospectus or offering memorandum. These expenses are paid by the Client, and are in addition to the fees paid to ACCESS.

Termination of Agreement. In the event that the *Financial Planning Agreement* is terminated, any unearned fees will be returned to the Client.

In the event that the *Asset Management Agreement* is terminated, fees collected for the quarter of termination will be retained by ACCESS to provide termination services to the Client.

Performance-Based Fees and Side-By-Side Management

Access does not charge performance-based fees to its clients.

Types of Clients

Description. ACCESS generally provides asset management and investment advice to individuals, corporations, profit sharing plans, trusts, and estates. Client relationships vary in scope and length of service.

Account Minimums. The minimum account size is \$500,000 of assets under management, or an annual fee of \$5,000.

Depending upon circumstances, ACCESS may execute an hourly fee arrangement with a Client if assets have diminished significantly below \$500,000.

ACCESS maintains the right to waive the account minimum. Accounts of less than \$500,000 may be established when the Client and the Advisor anticipate the Client will add additional funds to the accounts bringing the total to \$500,000 within a reasonable time. Other exceptions apply to employees of ACCESS and their relatives, existing Clients, or relatives of existing Clients.

Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis. ACCESS primarily uses fundamental analysis to select individual securities for purchase or sale. Fundamental analysis evaluates a company for financial strength, market dominance, and price relative to intrinsic value, among other factors when analyzing the potential purchase or sale of its securities. Access does not use technical analysis or market timing as methods for security selection or portfolio management.

The main sources of information used by ACCESS include research materials prepared by others, financial newspapers, magazines, corporate rating services, annual reports, prospectuses, filings with the Securities and Exchange Commission (SEC), company press releases, research available through its custodian(s) and the internet.

Investment Strategies. ACCESS develops investment strategy for Clients based upon the analysis performed during the financial planning process, or through interviews to establish clear objectives for the investments to be managed and/or supervised for the Client.

The primary investment strategy used for ACCESS Clients is strategic asset allocation. ACCESS builds a diversified core of investments adding investments around this core to further reduce the risk of the investment portfolio and to take advantage of investment opportunities. All Clients are linked to a model portfolio target. The model specifies the percent allocation of equities, fixed income and cash consistent with the Client's risk tolerance and risk capacity previously determined through consultation or the planning process. Model portfolios are assigned to each Client and used to rebalance investments between asset classes.

Core investments may contain actively managed mutual funds, passively managed index and/or exchange traded funds, or separately managed accounts. Additional investments may take the form of individual equities (stocks), individual fixed income investments (bonds), private equity, options or futures strategies, hedging strategies, etc. These additional holdings are added with the intent to reduce risk/and or enhance returns based on the individual needs and circumstances of the Client. Portfolios are further diversified by using international holdings, small company investments, real estate, energy/commodity investments and other appropriate investments that display low correlation to each other.

Client portfolios may change over time based on changing objectives of the Client, or based on other circumstances. ACCESS creates an *Investment Policy Statement* for each Client that documents current financial position, income needs, objectives, and basic investment strategy and limitations.

Access typically maintains a long term investment strategy for Client portfolios. However, circumstances may indicate the use of additional strategies such as short-term purchases, short sales, margin transactions, and option writing (including covered options, uncovered options or spread strategies), or other hedging strategies. Any of these strategies will be described in the *Investment Policy Statement* and discussed with the Client prior to execution.

Risk of Loss. All investment strategies have certain risks to investors. Although ACCESS seeks to reduce risk for its Clients, it cannot eliminate it. The following describes various risks that Clients may face:

Interest-rate Risk: Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.

Market Risk: The price of a security, bond, mutual fund, and even a diversified investment portfolio may drop in reaction to outside events. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.

Inflation Risk: When any type of inflation is present, a dollar spent next year will not buy as much as a dollar spent today because purchasing power of a dollar is eroded with inflation.

Currency Risk: Overseas investments, denominated in a local country's currency, are subject to fluctuation in the value of the dollar against that currency. This is also referred to as exchange rate risk.

Reinvestment Risk: The risk that future proceeds from investments might be invested at a lower rate of return if interest rates decline in the future.

Business Risk: Risks related to a particular industry or a particular company within an industry. For example, oil-drilling companies depend on discovering oil before they can generate a profit. They carry higher business risk than, for example, an electric utility which generates income from a steady stream of existing customers.

Liquidity Risk: Liquidity describes the ability to quickly convert an investment into cash with little principle risk. Assets are generally more liquid if they are standardized and attract many investors. For example, Treasury Bills are highly liquid, while real estate properties are not.

Financial Risk: Business debt increase risk as the borrowing company must meet its obligations regardless of profitability. During periods of financial stress, the inability to meet loan obligations may result in a declining market value for a company and/or bankruptcy.

Disciplinary Information

Legal and Disciplinary. ACCESS and its employees have not been involved in legal or disciplinary events related to past or present Clients.

Other Financial Industry Activities and Affiliations

Financial Industry Activities. ACCESS is a Registered Investment Advisor.

Affiliations. ACCESS has no arrangements that are material to its advisory or its Clients with a related person who is a broker-dealer, investment company, other investment advisor, financial planning firm, commodity pool operator, commodity trading adviser or futures commission merchant, banking or thrift institution, accounting firm, law firm, insurance company or agency, pension consultant, real estate broker or dealer, or an entity that creates or packages limited partnerships or other investments.

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics. The employees of ACCESS have committed to a *Code of Ethics*. The *Code of Ethics* is designed to place Clients interests above employees of Access at all times. Access will provide a copy of the *Code of Ethics* to any Client or prospective Client upon request.

Participation or Interest in Client Transactions. ACCESS and its employees may buy or sell securities that are also held by Clients. These securities are typically traded in high volume and are very liquid. It is unlikely that an employee's trading activity would have any impact on the availability or pricing of a security in Client portfolios. However, employees may not place trades for their own securities ahead of Client trades.

Personal Trading. The Chief Compliance Officer of ACCESS, Margaret M. Stokes, reviews all employee trades each quarter to ensure that the personal trading of employees does not affect the market trading or pricing of a security and that Clients receive preferential treatment in trading activity.

Brokerage Practices

Selecting Brokerage Firms. Specific Custodian recommendations are made based on a number of factors that are reviewed annually by ACCESS. ACCESS recommends Custodians based on the proven integrity and financial strength, technology, the quality of personnel, and the best execution of orders at reasonable commission rates. ACCESS currently recommends Charles Schwab & Co. as Custodian for its Clients.

ACCESS does not receive fees or commissions from these arrangements.

Best Execution. ACCESS reviews the execution of trades at each Custodian to ensure best execution. This review is documented in the *ACCESS Compliance Manual*. Trading fees charged by the Custodian(s) are also reviewed. ACCESS does not control or receive trading fees from any of its Custodians.

Soft Dollars. "Soft Dollar Arrangements" describe benefits received by an Advisor from an affiliate in exchange for the Advisor placing assets/trading activity with that affiliate. Soft Dollars typically take the form of products and/or services provided free of charge or on a discounted basis that the Advisor would normally pay full price for (e.g. research). ACCESS receives no soft dollar compensation from any of its affiliates.

Trade Aggregation. A substantial portion of trades placed by ACCESS is in mutual funds, exchange-traded funds, and highly liquid securities. ACCESS aggregates its trade orders where appropriate.

Review of Accounts

Periodic Reviews. Portfolio reviews are performed quarterly by William R. Casey – President, and Alex J. Olson – Planning and Investment Specialist. Account reviews are performed more frequently when market conditions dictate. In addition, taxable portfolios are reviewed in the fourth quarter for tax balancing. Gain and/or loss harvesting is done to reduce the tax impact of sales made during the year, and to offset other capital gains or losses realized for Client assets held outside of ACCESS' direct management.

Securities are reviewed as follows: Mutual funds - quarterly using criteria established by ACCESS, Fixed Income - weekly for changes in financial ratings, Equity holdings - daily for changes in research recommendations.

Additional Review Triggers. Other conditions that may trigger reviews are changes in a Client's circumstances, changes in tax laws, and changes in economic conditions, among others.

Regular Reports. ACCESS generates quarterly reports for Clients presented in both graphic and numeric form to assist in Client comprehension. These reports display current positions along with performance information detailing net (after all fees and expenses) returns for the recent quarter, trailing 12 months, and the inception rate of

return. Graphic reports illustrate the net performance of the portfolio against established benchmarks and track net deposits (deposits less withdrawals) against the current portfolio value.

Clients receive the ACCESS newsletter on a quarterly basis.

Ongoing asset management Clients are given access to a secure internet site containing their planning information as well as a daily valuation of all asset and liability accounts that have been linked to the system. This information can be accessed at any time by the Client using a unique user ID and password.

Client Referrals and Other Compensation

Referrals. ACCESS has grown primarily through referrals from existing Clients, as well as referrals from accountants, attorneys, bankers and other financial professionals. ACCESS does not compensate referring parties for these referrals, or receive compensation for referring Clients to others.

Outside Compensation. In some circumstances, insurance products may be recommended to Clients. In this case, Clients are provided with detailed recommendations for the appropriate product, enabling the Client to use existing insurance relationships to buy the insurance product. If the Client does not have a source for the insurance product an Advisor of Access, if appropriately licensed, may place the insurance for the Client at the Client's request. If the insurance product pays a commission, this commission is paid directly to the Advisor and not to ACCESS. Any commission is fully disclosed to the Client prior to placing the insurance product. The placement of an insurance product represents a separate arrangement with the Client outside any Client Agreement with ACCESS.

Custody

Account Statements. All Managed Account investments are held at qualified Custodians. These Custodians provide account statements directly to Clients at their address of record no less than quarterly. In addition, these Custodians provide Clients secure internet based access to their accounts which can be viewed by Clients at any time. Clients are encouraged to compare the statements provided by the Custodians to the statements provided by ACCESS to check for any inconsistencies.

Performance Reports. ACCESS generates quarterly performance reports. These reports compare Client account performance, after all fees and expenses, to generally accepted benchmarks.

Investment Discretion

Discretionary Authority for Trading. ACCESS maintains discretionary authority over Managed Account investments to facilitate changes to Client portfolios. ACCESS has the authority to determine, without obtaining specific Client consent, the quantity, timing, and selection of securities to be bought or sold.

ACCESS recommends the Custodian(s) to be used. Transaction fees and other holding costs are determined by the Custodian(s) and paid by the Client.

Limited Power of Attorney. Access Clients sign a Limited Power of Attorney (LPOA) authorizing ACCESS to execute trades on their behalf, disburse funds to Client authorized accounts, and to deduct ACCESS management fees from appropriate Managed Accounts.

Voting Client Securities

Proxy Votes. ACCESS does not vote proxies for securities. Clients are expected to vote their own proxies.

Financial Information

Financial Condition. ACCESS does not have any financial impairment that will preclude the firm from meeting contractual commitments to Clients.

Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards. ACCESS requires that Advisors in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and investment management. Examples of acceptable coursework include an MBA, CFP®, CFA, ChFC, JD, or CPA. Additionally, Advisors must have work experience that demonstrates their aptitude for financial planning and investment management.

Professional Certifications. Employees have earned certifications and credentials that are required to be explained in further detail.

Certified Financial Planner (CFP): Certified Financial Planners are licensed by the College for Financial Planning Board to use the CFP mark. CFP Certificants must meet the following requirements: a Bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP Board (www.cfp.net) successful completion of the CFP® Certification Exam, three-year qualifying full-time work experience, successful completion of the Candidate Fitness Standards and background check, and fulfillment of continuing education requirements.

Chartered Life Underwriter (CLU): Accreditation is through the American College. In order to use the CLU designation, individuals must successfully complete coursework in 7 required areas of insurance, tax, investments, etc. and 2 electives. Individuals must pass all required coursework and exams and meet ethical and experience (three years of related experience) requirements.

Chartered Financial Consultant (ChFC): Accreditation is through the American College. In order to use the ChFC designation, individuals must successfully complete coursework in 7 required areas of insurance, tax, investments, etc. and 2 electives required for the CLU designation plus additional coursework in Financial Planning. Individuals must pass all required coursework and exams and meet ethical and experience (three years of related experience) requirements.

William R. Casey, CFP, CLU, ChFC

Educational Background:

- University of Wisconsin – Madison, BBA - Marketing (1982)

Licensing Exams:

- General Securities Exam #7 (1983)
- General Securities Exam #63 (1983)
- Certified Financial Planner (1986)
- General Commodities Exam #3 (1987)
- Chartered Life Underwriter (1992)
- Uniform Investment Advisor Law Exam #65 (1995)
- Registered Principals Exam (1998)
- Chartered Financial Consultant (1999)

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: Mr. Casey is licensed in to sell life and health insurance. He may be paid a commission to place insurance for a Client. This activity is incidental and any commissions are paid directly to Mr. Casey.

Outside Activities: Mr. Casey is the incoming board chair (April 2013) of Holy Family Memorial where he currently serves on the board of directors. Mr. Casey is the incoming board chair (June 2013) of the Manitowoc County Economic Development Corporation. He also serves as the chair of the St. Francis of Assisi Catholic School Endowment Fund. In addition, he serves on the finance committee of Roncalli High School. Mr. Casey is a past board chair of Big Brothers Big Sisters of Manitowoc County.

Alex J. Olson

Educational Background:

- University of Wisconsin – Madison, BS - Economics (2004)

Licensing Exams:

- Uniform Investment Advisor Law Exam #65 (2007)

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Outside Activities: Mr. Olson is the current Finance Committee Chair and serves on the Board of Directors for Shady Lane Inc. an independent community based elderly living facility. Mr. Olson serves as a Trustee on the Manitowoc Calumet Library System Board, which oversees state resources allocated to the public libraries in Manitowoc and Calumet Counties. Mr. Olson is the current Vice President and serves on the Board of Directors and the Executive Committee of Big Brothers/Big Sisters of Manitowoc County, a youth mentoring organization. Mr. Olson is the current Treasurer, serves on the Board of Directors and on two Special Event Planning Committees and is the former Chairman of the Board of Directors and past President of the Manitowoc Jaycees, a young person's professional leadership and community service organization. Mr. Olson is the current Finance Committee Chair and serves on the Board of Directors (term expires April 2013) for Painting Pathways, a mental health advocacy organization.