

FEBRUARY 7-9, 2018 · HOTEL COLONNADE CORAL GABLES · MIAMI, FL

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CONFERENCE REGISTRATION RATES

Early Registration Pricing (before December 10, 2017)

\$1,950: First attendee from your family company

\$1,250: Each additional attendee

Standard Pricing (after December 10, 2017)

\$2,235: First attendee from your family company

\$1,450: Each additional attendee

CONFERENCE LOCATION

Hotel Colonnade Coral Gables
180 Aragon Ave, Coral Gables, FL 33134

DEVELOPING WEALTH STRATEGIES FOR THE FAMILY AND THE BUSINESS

Family Business Generational Wealth 2018, now in its second year, is the only wealth management conference for operating family businesses and enterprises.

Family Business Generational Wealth, from *Family Business Magazine*, is a different kind of wealth management conference, created by families for families, focused on real-world solutions to wealth management across generations, presented by family business executives and shareholders themselves.

This conference is ideal for:

- Family business CEOs/Chairs/CFOs
- Family office leaders
- Family business shareholders
- Family council leaders and members
- Family trust directors and executives

Among the topics to be covered at Family Business Generational Wealth 2018:

- What do you want your family business's wealth legacy to be?
- A deep dive into trusts
- Ownership transfer from one generation to the next: How to finance it and how to make it work.
- Raising kids and living with wealth
- Building liquidity without selling the company
- Family offices as investors

Breakout sessions on:

- Philanthropy • Foundations • Family offices
- Investing in family businesses • How to be a great trustee

PRELIMINARY PROGRAM

WEDNESDAY, SEPTEMBER 21, 2016

3 p.m. Registration Opens

5 p.m. Opening Session: Creating Your Family Business Wealth Legacy

Examining wealth within the context of your family's values and vision will help you find the right balance between preservation and growth—between risk and security for the future. This session will explore ways to structurally ensure the culture without inhibiting future generations' ability to find fulfillment and forge their own paths.

Speaker: Bill Yoh, Chairman, Yoh, A Day & Zimmerman Company

6:15 p.m. Keynote Interview

Speakers: Nannette de Gaspé Beaubien, Vice Chair, and Pierre de Gaspé Beaubien, President and Chairman, T Corp.

7 p.m. Welcome Reception and Dinner

THURSDAY, FEBRUARY 8, 2018

7:30-8:30 a.m. Breakfast

8:30-9:45 a.m. Transferring Ownership to the Next Generation

Multiple decisions are required in order to pass business ownership to the next generation. Should family members own shares directly, or should the enterprise go into a trust? When will both the older and younger generation be ready for the transfer? How formal, and how transparent, should the process be? What are the tax implications? If you don't have a solid transition plan, this session is the place to start.

Speakers: Mitchell Kaneff, Chairman/CEO, Arkay Packaging, Peter Willson, Chairman & CEO, Willson International Limited; Julie Charlestein, President & CEO, Premier Dental Products Company

9:45-10 a.m. Networking Break

10-11:15 a.m. Trusts: A Deep Dive for Family Companies

Everything you always wanted to know about trusts. There are a number of factors involved in setting up a trust, including the intent of the trust, trustee selection, guidelines for future beneficiaries and whether the trust should be revocable or irrevocable. This will be an open discussion about how to determine what you intend for your family and how to ensure the trust documents will reflect that intention.

Speaker: Carol L. Bernick, CEO, Polished Nickel Capital Management, former Executive Chairman, Alberto Culver Co.

11:15 a.m.-12 noon Keynote Interview

Speaker: Sam J. Susser, Director, Susser Holdings Corporation

12 noon-12:15 p.m. Networking Break

12:15-1:30 p.m. Lunch

1:30-2:30 p.m. Breakout Sessions/Expert Briefings

- Charitable Giving and Involving the Next Generation
- Choosing or Changing Wealth Advisers
- Developing a Foundation
- Family Office Structures
- Family Offices as Investors in Family Businesses
- How to Be a Great Trustee
- Women and Wealth

2:30-3 p.m. Networking Break

3-4:15 p.m. Creating Liquidity for Shareholders

This session will offer a deep dive into strategies for providing significant shareholder liquidity without jeopardizing the family's control of the company. Learn the details on the options (dividends, ESOPs, stock buyback, etc.) that enable the business to thrive while meeting the needs of family members who don't work in the business.

4:15-4:30 p.m. Networking Break

4:30-5:30 p.m. Concurrent Workshops

6:30 p.m. Group Dinner

FRIDAY, FEBRUARY 9, 2018

7:30-8:30 a.m. Breakfast

8:30-9:15 a.m. Keynote Case Study

9:15 a.m.-9:30 a.m. Networking Break

9:30-10:30 a.m. Breakout Sessions/Expert Briefings

- Charitable Giving and Involving the Next Generation
- Choosing or Changing Wealth Advisers
- Developing a Foundation
- Family Office Structures
- Family Offices as Investors in Family Businesses
- How to Be a Great Trustee
- Women and Wealth

10:30 a.m.-10:45 a.m. Networking Break

10:45 a.m.-12 noon Raising Kids with Wealth

When families talk about children and wealth, they often say their goal is to prevent an entitlement mindset from taking hold. The first step is to get an early start by teaching age-appropriate financial concepts and giving young people a sense of fiscal responsibility. As parents and grandparents, how do we model responsible stewardship of wealth?

Speaker: Mitzi Perdue, Perdue Farms; Paula Marshall, CEO, Bama Companies.

12 noon Conference Close and Lunch

To learn more and register for Family Business Generational Wealth, visit: www.familybusinessmagazine.com/fbgw2018

FEATURED SPEAKERS



Mitzi Perdue
Perdue Farms



Peter Willson
Chairman & CEO,
Willson International
Limited



Bill Yoh
Chairman, Yoh,
A Day & Zimmerman
Company



**Nannette de Gaspé
Beaubien**
Vice Chair, T Corp.



**Philippe de Gaspé
Beaubien III**
President and
Chairman, T Corp.



Julie Charlestein
President & CEO,
Premier Dental
Products Company



Carol L. Bernick
CEO, Polished Nickel
Capital Management;
former Executive Chairman,
Alberto Culver Co.



Sam J. Susser
Director, Susser
Holdings Corporation



Mitchell Kaneff
Chairman and CEO,
Arkay Packaging



Paula Marshall
Chief Executive
Officer, Bama
Companies