Family Business WEALTH

The conference for wealth preservation and growth across generations

SEPTEMBER 21-23, 2016 · WYNDHAM GRAND CHICAGO RIVERFRONT · CHICAGO, IL

From the creators of TRANSITIONS and the PRIVATE COMPANY GOVERNANCE SUMMIT, a new kind of wealth management conference.

There are many "wealth management" conferences out there, but they don't focus on **active family business wealth preservation and growth.** Family Business 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.

Among the topics to be covered at Family Business Wealth:

- Defining wealth objectives that work for the family and the business
- Managing intergenerational wealth transfer/estate transfer
- Capitalization and dividend strategies; liquidity, business valuation
- Affirmative/impact/passion/philanthropic investing
- Tax strategies for operating family companies
- NextGen financial literacy and responsibility
- Family offices, family investment banks and venture funds
- Personal and family security
- Choosing wealth management advisers
- Governance for wealth management and growth
- Family wealth case studies

This conference is ideal for:

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

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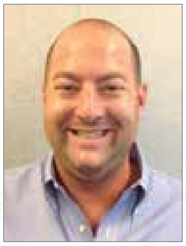
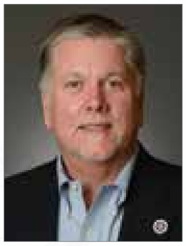
CONFIRMED SPEAKERS



Peter Bernick
Founder & Managing Partner, River Forest Capital Partners

Nancy P. Bruns
Chair, Investment Committee, Dickinson Company

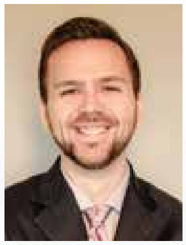


Preston Root
President, Root Family Board of Directors

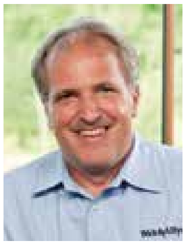
Harold L. (Hal) Yoh, III
Chairman and CEO, Day & Zimmermann

Keith Campbell
Chairman of the Board, Mannington Mills Inc.

Stuart E. Lucas
Adjunct Professor of Finance, The University of Chicago Booth School of Business

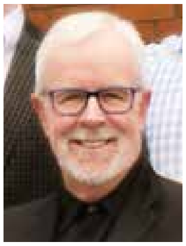


Chris Beagle
Consumer Insights Project Manager, McKee Foods Corporation

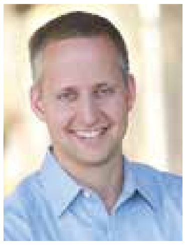


Eric Allyn
Former Board Member, Welch Allyn

George Isaac III
President, GAI Capital Ltd.

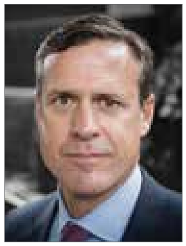


Dan J. Agnew
President, The Agnew Company



Clint Greenleaf
Founder and CEO, Pigs and Bricks

Caroline F. Davis
President, Keller Enterprises



Doug Wilwerding
Managing Principal, The Optimas Group, LLC

Rhona E. Vogel
CEO and Founder, Vogel Consulting

CONFERENCE REGISTRATION RATES

Standard Pricing

$2,235: First attendee from your family company

$1,450: Each additional attendee

Note: All attendees will be verified prior to acceptance of registration. The advisers of a family company may attend only if accompanied by one or more family company members. Other family company advisers may contact Scott Chase at (301) 879-1613 for information on attending.

CONFERENCE LOCATION

Wyndham Grand Chicago Riverfront

71 East Wacker Drive, Chicago, IL 60601

Phone: 312-346-7100

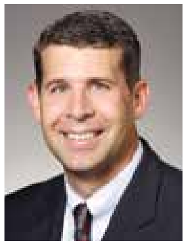
Email: info46897@wyndham.com

TO LEARN MORE AND REGISTER FOR FAMILY BUSINESS WEALTH, VISIT:

www.familybusinessmagazine.com/fbwealth2016

Chris Vernon
President and COO, The Vernon Company

Sara Hamilton
Founder and CEO, Family Office Exchange



Don DiCarlo, Jr.
Director of Wealth Planning and Senior Wealth Strategist, Wilmington Trust

WYNDHAM GRAND CHICAGO RIVERFRONT

A limited number of rooms are available at the reduced *Family Business* magazine rate of $259 single or double occupancy, plus 16.4% taxes. Rooms at this special rate are available on a first-come, first-serve basis and reservations may be made by calling reservations at 1-312-346-7100 or 1-800-WYNDHAM and requesting the *Family Business* Magazine Wealth Management Conference rate before August 31, 2016. After this date, rooms will be available at the prevailing hotel rate. If you are planning to extend your stay in Chicago beyond the conference dates, please note the group rate may be available three days before and after the conference dates based upon room availability at the hotel.

PRELIMINARY PROGRAM

WEDNESDAY, SEPTEMBER 21, 2016

3 p.m. Registration Opens

5 p.m. Opening Session: Defining Wealth Objectives That Work for the Family and the Business

How do you balance the cash needs of the business and the wealth needs of the family? This session will focus on how operating family companies have created objectives for both the business and the family, including how the Nextgen fits in to the vision.

*Speakers: **Chris Vernon**, President and COO, The Vernon Company; **Dan Agnew**, President, The Agnew Company*

6:15 p.m. Keynote Address

7 p.m. Welcome Reception and Dinner

THURSDAY, SEPTEMBER 22, 2016

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

8:30-9:30 a.m. Managing the Wealth of the Family Enterprise: A Framework and Process

The family enterprise's wealth, which encompasses the business and the family, can be holistically managed through the use of a strategic framework which results in a clear process for developing specific wealth management and growth tactics.

*Speakers: **Stuart E. Lucas**, Adjunct Professor of Finance, The University of Chicago Booth School of Business; **Sara Hamilton**, Founder and CEO, Family Office Exchange*

9:30-10:45 a.m. The Wealth of the Business

This session will address strategies developed by active family businesses to keep the wealth generated in the business, while also providing liquidity for family members.

*Speakers: **Keith Campbell**, Chairman of the Board, Mannington Mills Inc.; **George Isaac III**, President, GAI Capital Ltd.; **Harold L. (Hal) Yoh III**, Chairman and CEO, Day & Zimmermann*

*Moderator: **Rhona E. Vogel**, CEO and Founder, Vogel Consulting*

10:45 a.m. Networking Break

11:15 a.m.-12:15 p.m. Breakout Sessions/ Expert Briefings

- Maximizing Tax Planning Opportunities for Business-Owning Families
- The Family Wealth Conversation: Getting it Started, Keeping it Going: Jake Thiessen, PhD, Nicolee Hiltz, PhD, Couples at Crossroads
- Family Offices: The Next Frontier for Business-Owning Families
- Family Investment Banks and Venture Funds
- Choosing Wealth Management Advisers: Sara Hamilton, FOX
- Financial Literacy—What does an effective educational program look like?
- Making a Market for Your Family Stock: Rhona E. Vogel, Vogel Consulting

12:15-12:30 p.m. Networking Break

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

1:45-2:45 p.m. Family Wealth Case Studies

2:45-3 p.m. Networking Break

3-4:15 p.m. Managing Intergenerational Wealth Transfer/Estate Transfer

This session will focus on what has worked and what hasn't in wealth and estate transfer for three family businesses.

*Speaker: **Preston Root**, President, Root Family Board of Directors*

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

4:30-5:45 p.m. Affirmative/Impact/Passion/ Philanthropic investing

This session will explore various types of family philanthropy, with a special focus on ensuring these activities can be used to build family cohesion and commitment.

*Speakers: **Caroline F. Davis**, President, Keller Enterprises; **Chris Beagle**, Consumer Insights Project Manager, McKee Foods Corporation; **Doug Wilwerding**, Managing Principal, The Optimas Group, LLC*

6:30 p.m. Group Dinner

Metropolitan Club

FRIDAY, SEPTEMBER 23, 2016

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

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

*Speaker: **Eric Allyn**, Former Board Member, Welch Allyn*

9:15-10:15 a.m. Breakout Sessions/Expert Briefings

- Maximizing Tax Planning Opportunities for Business-Owning Families
- The Family Wealth Conversation: Getting it Started, Keeping it Going: Jake Thiessen, PhD, Nicolee Hiltz, PhD, Couples at Crossroads
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- Making a Market for Your Family Stock: Rhona E. Vogel, Vogel Consulting

10:15-10:45 a.m. Networking Break

10:45 a.m.-12 noon Ensuring That Wealth Grows in the Next Generation

Panelists will discuss dealing with entitlement issues, living with wealth and keeping it, and raising kids with wealth.

*Speakers: **Peter Bernick**, Founder & Managing Partner, River Forest Capital Partners; **Nancy P. Bruns**, Chair, Investment Committee, Dickinson Company; **Clint Greenleaf**, Founder and CEO, Pigs and Bricks*

*Moderator: **Don DiCarlo, Jr.**, Director of Wealth Planning and Senior Wealth Strategist, Wilmington Trust*

12 noon Conference Close and Lunch

Questions?

Call Justine Wood, Events Director at (703) 850-5497 or email her at jwood@familybusinessmagazine.com