

# TRANSITIONS EAST 2016

April 6-8 | Renaissance Vinoy Resort | St. Petersburg, FL

Register Online: [www.familybusinessmagazine.com](http://www.familybusinessmagazine.com)

The conference created *for* family companies *by* family companies

**Transitions East 2016 offers powerful sessions that deliver ideas you can put to work now to sustain and build your family company. This conference is for family companies of all sizes and generational stages.**

## Transitions features:

- **Speakers from family companies:** Our focus is on speakers from family enterprises, sharing real-life problems and solutions.
- **Intimate, open environment:** Limited attendance, and a private "safe harbor" environment in which to openly share challenges and opportunities with other families.
- **Collaborative discussions:** Opportunities to work through family issues via guided discussions.
- **No-sell environment:** Conference sponsors understand and commit to participating as thought leaders and experts, and are restricted from actively selling their products and services.

- **Special content and sessions for next-generation and married-in family members**
- **Networking with families like yours:** Hosted networking, opening reception, meals, breaks and workshops are all designed to allow you to meet many family enterprise attendees.
- **Family focus:** Brought to you by family-owned *Family Business Magazine*. We use family-owned or -controlled hotels, transportation services, restaurants and service providers whenever possible. We believe in, and invest in, America's family businesses.
- **Hosted family meetings:** For attending families who want to meet before and/or after the conference. Meetings will be professionally facilitated. Limited availability.

**Special Bonus:** To extend and enhance conference learning, all attendees will receive a free one-year subscription to *Family Business Magazine* (or a one-year extension of their current subscription). Subscription includes access to *Family Business's* online archive of more than 700 articles, organized by topic.

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# FEATURED FAMILY BUSINESS SPEAKERS



**Mitzi Perdue**  
Perdue Farms



**Christi Offutt**  
Chairperson, RDO Enterprise



**Timothy B. Hussey**  
President and CEO,  
Hussey Seating Company



**Debbie S. Brown**  
Chairman of the Board,  
Laird Norton Company



**Sam Freeman**  
Senior Vice President,  
Freeman's Trusts & Estates  
Department



**Mary Vermeer  
Andringa**  
CEO and Chair of the Board,  
Vermeer Corporation



**Meredith Donaher**  
Marketing Associate,  
Gault Energy & Stone



**Marylyn Reed**  
Family Council Member,  
Mary Kay Inc.



**Todd Litzsinger**  
Chairman of the Board,  
Follett Corporation



**Louie Gentine**  
CEO, Sargento Foods



**Carol L. Bernick**  
CEO, Polished Nickel  
Capital Management



**Chris Vernon**  
President and COO,  
The Vernon Company



**Emily Sheetz**  
Director of Talent  
Development, Sheetz Inc.



**Ryan O'Melveny  
Wilson**  
Vice President and Executive  
Chef, Lawry's Restaurants Inc.



**Laura Gicela**  
Family Employee  
Engagement Liaison, Elkay  
Manufacturing Company

## Conference Venue

The **Vinoy Renaissance St. Petersburg Resort & Golf Club**, from family-controlled Marriott Hotels, is located near the area's most popular attractions, including the Salvador Dalí Museum, the Morean Arts Center, Tropicana Field and a variety of Florida beaches. The hotel also offers easy access to Tampa International Airport (TPA) and St. Petersburg-Clearwater International Airport (PIE) as well as shopping and restaurants. The Vinoy Renaissance is also home to five restaurants, a full-service spa, an 18-hole golf course, a fitness center and an outdoor pool.



# CONFERENCE AGENDA

(Subject to change as speakers are added.)

## Wednesday, April 6

### 2:30-6:30 p.m. Registration

### 3:30-4:30 p.m. Family Business Basics

### 5-6:15 p.m. Secrets of the Oldest Family Businesses

It is not easy to sustain a family enterprise for more than 100 years. Owners of companies that have been continuously owned by the same family for more than a century discuss the challenges they encountered along the way, how those challenges were overcome, their successful business strategies and the values that have kept the family united in support of their business.

*Speakers: Timothy B. Hussey, President and CEO, Hussey Seating Company; Sylvia Shepard, Former Chair, Smith Family Council, Menasha Corporation; Debbie S. Brown, Chairman of the Board, Laird Norton Company; Sam Freeman, Senior Vice President, Freeman's*

### 6:15-6:45 p.m. Opening Keynote

### Success Tips for Members of Family Businesses

*Speaker: Mitzi Perdue*

### 6:45-9 p.m. Welcome Reception and Dinner

## Thursday, April 7

### 7:30 a.m.-4:30 p.m. Registration Open

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

### 8:30-9:45 a.m. Navigating Shareholder Dynamics: Relationships, Policies and Process

Having policies in place before they are needed can help a family ownership group navigate smoothly through issues such as shareholder liquidity, protecting the business from divorce, buying out an owner and discussing an offer to sell. Panelists will explain their policies and how (and why) those policies were developed.

*Speakers: Mary Vermeer Andringa, CEO and Chair of the Board, Vermeer Corporation; Todd Litzinger, Chairman of the Board, Follett Corporation*

### 9:45-10:15 a.m. Networking Break

### 10:15-11:30 a.m. Uniting Siblings and Cousins

In order to be successful as a business family, siblings and cousins must learn to think of each other as business partners. What can be done to overcome rivalries and bring them together—including their spouses? Panelists discuss the role of family governance and informal bonding experiences in keeping relationships on track.

*Speakers: Marylyn Reed, Family Council Member, Mary Kay Inc.; Chris Vernon, President & COO, The Vernon Company; Laura Gicela, Family Employee Engagement Liaison, Elkay Manufacturing*

### 11:30 a.m.-12:30 p.m. Expert Briefings

- The Transition to the Second Generation
- How to Teach the NextGen about Wealth and Finance
- Creating Effective Family Employment Policies
- Key Family Documents, Including Prenups
- Capitalization and Liquidity for the Family Business
- Taxes, Trusts and Estate Planning
- NextGen: How to Be an Entrepreneur in Your Family Business
- Strategies for Dealing with Family Conflict

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

### 1:30-2 p.m. Networking Break

### 2-3:15 p.m. Engaging the NextGen with the Family Enterprise

What's the best way to introduce your children to the family business—whether or not they envision themselves working there one day? What does the family business mean to the family, and how can this best be communicated? How do you initiate a frank discussion about wealth, values and work ethic?

What are age-appropriate ways to talk about these topics with kids as they grow?

*Speakers: Meredith Donaher, Marketing Associate, Gault Energy & Stone; Emily Sheetz, Director of Talent Development, Sheetz Inc.*

### 3:15-3:30 p.m. Networking Break

### 3:30-4:30 p.m. Concurrent Sessions

- NextGen Roundtable
- Married-Ins
- Cousin Relationships
- Sibling Relationships

### 6-9 p.m. Group Dinner

## Friday, April 8

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

### 8:30-9:15 a.m. Keynote Address

*Speaker: Carol L. Bernick, CEO, Polished Nickel Capital Management (and Former Executive Chairman, Alberto-Culver Company)*

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

### 9:30-10:30 a.m. Expert Briefings

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

### 10:45 a.m.-12 noon Successful Successor Development

What can the senior generation do to help successors establish authority and effectiveness? What is the best way to mentor a rising next-generation member? How can senior-generation members teach the future business owners about judicious risk taking? How should a future leader be introduced to key partners such as bankers, vendors and customers?

*Speakers: Christi Offutt, Chairperson, RDO Enterprise; Louie Gentine, CEO, Sargento Foods; Ryan O'Melveny Wilson, Vice President and Executive Chef, Lavry's Restaurants Inc.*

### 12 noon-1:15 p.m. Conference Wrap-Up and Lunch

## What Attendees Say About Transitions

*"This is the most rewarding conference I've ever attended. Everyone has been so candid, genuine and open. Love that the tone is showing and not telling people what to do."*

*"Often times I'm excited to go to a conference and then it's unmemorable. This conference was well-planned, extremely relevant, unpretentious ... and we had a good time."*

*"I think this was the best-run conference that I have ever attended. So much value. We will be back."*

*"Great interaction and sharing. Brilliant!"*

*"This is my sixth Transitions and I continue to learn priceless information and make valuable connections with other families."*

*"Very insightful conference, so many notes I can take back and implement ideas. Great validation of what we are doing right and where we need to improve."*

*"I was hoping to get the family to raise questions and their awareness. I did not expect to actually walk away with a healthy to-do list—things we need to change or do. Thank you!"*

*"Transitions was an eye-opening experience to help our family business create the appropriate ownership and succession structure for the business to thrive into the 6th generation."*

*"My goal was to raise awareness within the family of how we could bring governance to the business to make it stronger. I had been receiving resistance to the idea and the family left inspired to start a more formal family council structure and create mission and values statements. Goal accomplished!"*

# REGISTER TODAY FOR BEST RATES!

Register online at [www.familybusinessmagazine.com](http://www.familybusinessmagazine.com)

**Please Note:** Attendance at this conference is limited to members, owners, senior executives (including non-family executives and non-family board members) or shareholders of family-owned businesses whose primary business is other than advising family-owned businesses. Senior advisers to family businesses may attend only with family members. Attendance is strictly limited to the first 75 family businesses/enterprises who register.

## Early Bird Pricing (through January 15, 2016)

First attendee from your family company: \$1,645  
Each additional attendee (age 30 and above): \$1,150  
Each additional NextGen attendee (age 29 or below): \$975

## Standard Pricing (after January 15, 2016)

First attendee from your family company: \$1,850  
Each additional attendee (age 30 and above): \$1,350  
Each additional NextGen attendee (age 29 or below): \$1,150

Past attendees of Transitions conferences and Stetson University alumni: Deduct 10% from the registration fee.

Registration price includes all conference materials, as well as breakfast, lunch and dinner on April 7, breakfast and lunch on April 8, and a welcome reception with buffet dinner on April 6, as well as refreshment breaks.

**Hotel Reservations:** \$249 (net non-commissionable). Reservations must be made before March 15, 2016 to earn this rate. To reserve your room, call (888) 789-3090 and ask for the Transitions East 2016 group rate.

## REGISTRATION FORM

### PERSONAL INFORMATION

JOB TITLE \_\_\_\_\_

FIRST NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_

FAX NUMBER \_\_\_\_\_

### COMPANY INFORMATION

COMPANY NAME \_\_\_\_\_

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The primary attendee is a member, owner, senior executive or shareholder of a family-owned business, and is a family member.

The primary attendee is an adviser to a family-owned business.

I am a Stetson University alum/past Transitions attendee.

Please **fax** your registration form to Justine Wood at: (301) 987-0476, or **mail** to:

Justine Wood, Transitions Program Manager  
13631 Maidstone Lane  
Potomac, MD 20854

**Questions?** Call Justine Wood at (703) 850-5497 or email her at [jwood@familybusinessmagazine.com](mailto:jwood@familybusinessmagazine.com)

**Cancellation Policy:** All conference cancellations must be made in writing and sent to Justine Wood, Transitions Program Manager, 13631 Maidstone Lane, Potomac, MD 20854; faxed to (301) 987-0476 or emailed to [jwood@familybusinessmagazine.com](mailto:jwood@familybusinessmagazine.com). Registrants who cancel more than four weeks prior to

the program date are entitled to a full refund of the registration fee less an administrative fee of \$150 per registrant; if canceled within four weeks, but more than 10 business days prior to the conference date, 50% of the conference registration fee will be refunded less an administrative fee of \$150 per registrant;

within ten business days of the conference date and no shows, no refund is possible. Family Business Magazine may cancel the program if attendance does not meet required levels; in case of cancellation or rescheduling, full refunds of registration fees will be made. Travel fares and hotel deposits cannot be reimbursed.

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ATTENDEE 2 NAME \_\_\_\_\_

ATTENDEE 3 NAME \_\_\_\_\_

ATTENDEE 4 NAME \_\_\_\_\_

NEXT GENERATION ATTENDEE NAME (AGE 15-29) \_\_\_\_\_

NEXT GENERATION ATTENDEE NAME (AGE 15-29) \_\_\_\_\_

NEXT GENERATION ATTENDEE NAME (AGE 15-29) \_\_\_\_\_

Number of people attending: \_\_\_\_\_

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