

TRANSITIONS WEST 2013

Family Business Dynamics and the Dynamic Family Business

November 13-15, 2013 • Coronado Island Marriott • San Diego, CA

Register Online: www.familybusinessmagazine.com/transitions

The conference created *for family companies by family companies*

Transitions West 2013, from *Family Business Magazine* and Stetson University's Family Enterprise Center, offers powerful sessions that deliver ideas you can put to work now to sustain and build your multi-generational family company. Key topics to be addressed include:

- The various roles family members play in the family enterprise – and how to keep those roles separate and defined.
- Getting succession right.
- Building trust and respect, and strengthening communications, within the family.
- Dealing with sensitive family issues.
- Engaging the next generation in the transition from child to owner.
- Entrepreneurship, investment and the dynamic – and sustainable – family business.

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FEATURED FAMILY SPEAKERS

(For complete speaker biographies, visit www.familybusinessmagazine.com/transitions)



Phillip A. Clemens
Chairman and CEO,
The Clemens Family
Corporation



Howdy S. Holmes
President and CEO,
Chelsea Milling



Eric Allyn
Board Member,
Welch Allyn



Timothy B. Hussey
President and CEO,
Hussey Seating



Charles S. Luck IV
President and CEO,
Luck Companies



Preston Root
President, Root
Family Board of
Directors



Kareem Afzal
Vice President, Business
Development Manager,
PDC Machines



Joshua Nacht
Board Member,
Bird Technologies



Harold L. Yoh III
CEO, Day &
Zimmermann



**Anne Eiting
Klamar, M.D.**
President and CEO,
Midmark Corporation

New this year:

- Optional prescheduled individual meetings with peers or experts.
- Special interest group meetings for those who would like to discuss issues facing family councils, family offices, the next generation, non-family executives and the senior generation.
- Smaller group dinners — and a choice of restaurants — to facilitate better networking.
- Smaller group sessions to facilitate discussion.
- Topic-based focus sessions to allow attendees and their family members to drill down more deeply into areas of specific interest or need.
- Pre-conference facilitated family meetings (limited availability).
- Transitions 101, a pre-conference session focusing on family business basics, and how to get the most out of the conference itself.



Conference Venue

Coronado Island Marriott Resort & Spa offers stunning views of the San Diego skyline and a comfortable atmosphere for relaxation and renewal. Features include a full-service health spa and convenience to beaches, shopping and restaurants.

CONFERENCE AGENDA

(Subject to change as speakers are added.)

Wednesday, November 13, 2013

12 NOON - 3 P.M. Family Meetings (Optional)

For attending families bringing a large contingent of non-attending family members. Guided by an expert facilitator, the family will lay out key issues and opportunities for discussion. Non-attending family members may participate in the welcome reception and group dinner. (Open to three families, first come/first served. Transitions will coordinate and provide meeting space, refreshments and the facilitator, at cost.)

4 P.M. Transitions 101 (Optional pre-conference session)

A special session for first-time attendees and those wishing to brush up, focused on family business basics and strategies to maximize the value of the conference.

Speakers: Peter Begalla, Stetson University; David Shaw, *Family Business*; Dennis Jaffe, Saybrook University; Barbara Spector, *Family Business*

6 P.M. Opening Session

Welcome and keynote address.

7 P.M. Welcome Reception

Sponsored by PwC

Thursday, November 14, 2013

8:30 A.M. Keynote Address

"Values-Based Leadership and the Family Business"

Speaker: Charles S. Luck IV, President and CEO, Luck Companies

9 A.M. Panel Conversation: Know Which Hat You're Wearing

Family members can play many roles within the family enterprise — shareholder, family member, family leader, business leader, business employee. Keeping these roles separated, and clearly defined, can be a challenge. This conversation will focus on how families have separated these key roles, and the value they found in that separation.

Speakers: Howdy S. Holmes, President and CEO, Chelsea Milling; Joshua Nacht, Board Member, Bird Technologies; Anne Eiting Klamar, M.D., President and CEO, Midmark Corporation

10:30 A.M. Panel Conversation: Family Dynamics — Building Trust, Respect and Communication

Building trust and respect and fostering communication within the family are keys to avoiding disputes that can threaten the future of the family business and the family itself. This conversation will focus on proven strategies to build family cohesion and to avoid or resolve disputes.

Speakers: Eric Allyn, Board Member, Welch Allyn; Harold L. Yoh III, CEO, Day & Zimmermann

12 NOON Lunch and Table Discussions

Sponsored by Abbot Downing

1 P.M. Focus Sessions

Breakout sessions by generational stage of the company.

2:30 P.M. Panel Conversation: Deal- ing with Sensitive Family Issues

Because of the interpersonal relationships in a family business, addiction, mental illness, unsuitability for leadership and other problems are potentially explosive and can threaten the future of the family and the family business. The role of wellness programs as a preventative will also be discussed.

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

4 P.M. Focus Sessions

Each focus session will feature 10 to 15 minutes of expert presentation on the topic followed by facilitated discussion among attendees.

- Tax and Estate Planning
- Trusts and Ownership
- Wealth Management
- Family Dynamics
- Next Generation
- Married-Ins
- Family Councils

5-7 P.M. Attendees' Choice

1. **Break:** Take two hours to relax and recharge.
2. **Family Get-Togethers:** Meet with your family members to discuss conference learnings.
3. **Individual Pre-Scheduled Meetings:** One-to-one meetings for those who want to participate, scheduled in advance of the conference.

4. Special Interest Group Meetings:

Meet with peers for discussion on issues facing:

- Family Council leaders and members
- Family Offices
- Next Generation
- Non-family Executives
- Senior Generation

7-10 P.M. Group Dinners

Three restaurant choices.

Sponsored by Bessemer Trust

Friday, November 15, 2013

8 A.M. Panel Conversation: From Child to Owner: The Engaged Next Generation

What does it take for the next generation to be good owners? What can the family do to foster a sense of stewardship; develop good relationships between the next generation and family members, employees and the community; and teach young family members to respect the mission of the family business and work toward its sustainability?

Speakers: Philip A. Clemens, Chairman and CEO, The Clemens Family Corporation; Kareem Afzal, Vice President, Business Development Manager, PDC Machines; Timothy B. Hussey, President and CEO, Hussey Seating Company

9:30 A.M. Panel Conversation: Entrepreneurship, Investment and the Dynamic Family Business

This session will focus on deploying family wealth in new and exciting ways both within and outside the founding business. Discussion topics will include investing family capital and encouraging new ways of thinking.

11:30 A.M. Workshop

Conference takeaways, key learnings and action step commitments

12 NOON Closing Keynote Address

12:45 P.M. Lunch and Networking

Sponsored by Vogel Consulting

2-3 P.M. Family Meeting Follow-Ups

Action steps and commitments.

REGISTER TODAY FOR BEST RATES!

Register online at www.familybusinessmagazine.com/transitions

Please Note: Attendance at this conference is limited to members, owners, senior executives (including non-family executives and non-family board members) and shareholders of family-owned businesses whose primary business is other than advising family-owned businesses. 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 (Expires Sept. 20, 2013)

First attendee from your family company: \$1,495
Each additional attendee (age 30 and above): \$995
Each additional Next-Generation attendee (ages 15-29): \$795

Standard Pricing (Sept. 21, 2013 or later)

First attendee from your family company: \$1,695
Each additional attendee (age 30 and above): \$1,195
Each additional Next-Generation attendee (ages 15-29): \$995

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 November 14, breakfast and lunch on November 15, and a welcome reception with buffet dinner on November 13, as well as refreshment breaks.

Hotel Reservations: \$229 plus state and local taxes (net, non-commissionable). Includes wired or wireless Internet access. To reserve your rooms, call (800) 228-9290 and refer to the group (Family Business Magazine) and meeting name (Transitions West 2013).

The confirmed guest room rates will be in effect for three days prior to and three days after the conference, subject to availability.

REGISTRATION FORM

PERSONAL INFORMATION

JOB TITLE

FIRST NAME

LAST NAME

EMAIL ADDRESS

PHONE NUMBER

FAX NUMBER

COMPANY INFORMATION

COMPANY NAME

STREET ADDRESS

CITY

STATE/PROVINCE

ZIP/POSTAL CODE

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 justineawood@me.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 justineawood@me.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 one week prior to the conference date, 50% of the conference registration fee will be refunded less an administrative fee of \$150 per registrant; within one week of the

conference date and no shows, no refund is possible. *Family Business Magazine* and Stetson Family Enterprise Center 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.

PRIMARY ATTENDEE NAME

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: _____

Discount code _____

Total Cost (USD): _____

PAYMENT

Enclosed is my check for \$ _____
(Payable to *Family Business Magazine*)

Please charge \$ _____ to my:

Mastercard Visa American Express

FIRST NAME

MI

LAST NAME

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(Located on the back or front of your card; find the 3- or 4-digit code)

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