



TRANSITIONS WEST 2015

November 4-6, 2015 | Marriott Newport Beach | Newport Beach, CA

The art of family business succession and governance

Register Online: www.familybusinessmagazine.com/transitions

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

Transitions West 2015 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.

Key topics to be addressed include:

- Effective cross-generational communication strategies
- The Handoff: Detailed succession plans and results
- Succession and non-family leadership
- Effective family employment policies
- The role of effective governance in succession

Plus, special Next Generation sessions

(For NextGen attendees ages 15-29)

- Panel Discussion: Building Your Credibility in the Family Business
- Breakout Discussions

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).

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FEATURED FAMILY BUSINESS SPEAKERS

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



James D. 'Jamey' Power IV
Managing Partner, Power Family Enterprises



Kelly Conklin
President, Gordon's Window Décor



Peter Latta
Chairman and CEO, A. Duie Pyle



Jack Ouellette
Chairman, American Textile Company



Darcy Howe
Advisory Board Member, Bama Companies; Director, Heatron



Kyle Fernley
Director of Premier Meetings by Fernley, Fernley and Fernley



Charles R. Kelley, M.D.
Chairman of the Board, Outrigger Enterprises Group



Lauren Tracy
Business Development Manager, Dot Foods Inc.



Ken Gorman
Vice President and Shareholder, Power Construction Company



Shayne Whittwer
Board Member, Whittwer Inc.



Mark Contreras
Chief Executive Officer, Calkins Media Inc.



Paula Marshall
Chief Executive Officer, Bama Companies



Philip A. Clemens
Retiring Chairman, The Clemens Family Corporation



Jim Ethier
Chairman of the Board, Bush Brothers & Company



Cynthia Watts
Director, Furst-McNess Company



Yanki Greenspan
President & CEO, Westland Real Estate Group



Martha Furst
Vice Chairman, Furst-McNess Company



Lindsay Geyer
Former Chief Human Resources Officer, Port Blakely Companies



Ryan Wilson
Vice President and Executive Chef, Lawry's Restaurants Inc. and Director of Operations for Five Crowns / SideDoor and The Tam O'Shanter



Sylvia Shepard
Former Chair, Smith Family Council, Menasha Corporation



Chris Harrison
Director of Room Operations, Irvine Marriott

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 after the conference, professionally facilitated. Limited availability.

TO REGISTER, visit:

www.familybusinessmagazine.com/transitions

QUESTIONS?

Contact **Justine Wood**, Program Manager, jwood@familybusinessmagazine.com or (703) 850-5497

CONFERENCE VENUE

The **Newport Beach Marriott Hotel and Spa** is located 5 miles (approximately 15 minutes) from the Orange County/John Wayne Airport (SNA). After a \$70 million transformation, this hotel offers a sleek, modern style and an all-new spa, Pure Blu, with a saltwater lap pool, private cabanas and a state-of-the-art fitness center.



CONFERENCE AGENDA

(Subject to change as speakers are added.)

Wednesday, November 4, 2015

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

Speakers: Sylvia Shepard, Former Chair, Smith Family Council, Menasha Corporation; Debbie Bing, Principal, CFAR

Opening Session

5-6:15 p.m. Effective Cross-Generational Communication Strategies

What can the older and younger generations do to bridge the generational divide and really communicate? Each generation has different styles and standards of communication. Often, this can be a barrier to effectively finding common ground and agreement. What is the most productive way to overcome differences in communication styles, such as a preference for making a phone call vs. sending a text?

Moderator: Arne Boudewyn, Head of Family Dynamics and Education, Abbot Downing

Speakers: Kelly Conklin, President, Gordon's Window Decor; Lauren Tracy, Business Development Manager, Dot Foods Inc.; Charles R. Kelley, M.D., Chairman of the Board, Outrigger Enterprises Group

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

"The J.D. Power Family Governance System"

Speaker: James D. "Jamey" Power IV, Managing Director, Power Family Enterprises

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

Thursday, November 5, 2015

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

8:30-9:45 a.m. The Handoff: Detailed Succession Plans and Results

A well-planned succession is a process, not a single event. Panelists will offer a detailed look at their leadership transitions, focusing on the year before and the year after the new leader took the helm. What proceeded as planned, and what unexpected circumstances arose?

Moderator: Stephanie Brun de Pontet, Senior Consultant, Family Business Consulting Group

Speakers: Philip A. Clemens, retiring chairman, The Clemens Family Corporation; Jim Ethier, retiring chairman, Bush Brothers & Company

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

10:15-11:30 a.m. Succession and Non-Family Leadership

There are a variety of reasons why a non-family member may be the best choice to lead a family business, for either the short- or long-term. Panelists will discuss the circumstances surrounding the ascent of a non-family CEO, why a non-family member was chosen, how family buy-in was achieved and the recruitment and onboarding

processes. Ultimately, the panel will examine whether the decision to go outside the family for leadership was effective, and what that decision's impact was on the family and the business.

Moderator: Bryant W. Seaman III, Managing Director and Head of Private Asset Advisory Services, Bessemer Trust

Speakers: Jack Ouellette, Chairman, American Textile Company; Ken Gorman, Vice President and Shareholder, Power Construction Company; Mark Contreras, CEO, Calkins Media Inc.

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

Solving Family Conflicts: Doug Baumel, Founder/President, Continuity Family Business Consulting

Preuptial Agreements: Mark Haranzo, Partner, Withers Bergman LLP

Key Family Documents: Lloyd E. Shefsky, Founder and Co-Director, Center for Family Enterprises, Kellogg School of Management

Effective Family Philanthropy: Anna Nichols, Director of Communications, Altair Advisers

Developing Family Leadership: Daisy Medici, Managing Director of Family Governance and Education, GenSpring

Sparking Entrepreneurship in the Family Business: Andrew D. Pitcairn, Pitcairn Family Council Chair

Engaging Family Members Who Are Not Active in the Business: Karen Clark, Managing Director of Councils, Family Office Exchange

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

1:30-2 p.m. Networking Break

2-3:15 p.m. Effective Family Employment Policies

One of the major issues a family business faces is employment of family members. Who can join the company? How much should they be paid? Should they earn perks not available to other employees or family members not employed in the business? Who judges their performance? Panelists will discuss their policies on family employment, and their effect on the tone and culture of the family and the family business.

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

Speakers: Peter Latta, Chairman & CEO, A. Duie Pyle; Chris Harrison, Director of Hotel Operations, Irvine Marriott; Shayne Wittwer, Board Member, Wittwer Inc.

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

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

Special Next-Generation Session: Building Your Credibility in the Family Business

Next-Generation members will discuss the steps

they took to build their knowledge of the family business, and to establish their credibility with older family members and non-family employees.

Moderator: Scott A. Winget, Managing Director, Center for Wealth Impact, Ascent Private Capital Management

Speakers: Kyle Fernley, Director of Premier Meetings by Fernley, Fernley and Fernley; Jordyn Rowntree, Rowntree Enterprises; Yanki Greenspan, President and COO, Westland Real Estate Group

The Married-In Experience: Arne Boudewyn, Head of Family Dynamics and Education, Abbot Downing

Building the Cousin Consortium: Nancy Drozdow, Principal and Vice President, CFAR

Sibling Partnerships: Justin Craig, Co-Director, Kellogg Center for Family Enterprises; Co-Director, Kellogg ISB MFAB Program

6-9 p.m. Group Dinner at Family-Owned Five Crowns

Speaker: Ryan Wilson, Vice President and Executive Corporate Chef, Lawry's Restaurants, Inc.

Friday, November 6, 2015

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

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

Speaker: Paula Marshall, CEO, Bama Companies

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

9:30-10:30 a.m. Focus Sessions

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

10:45 a.m.-12 noon The Role of Effective Governance in Succession

Independent directors and advisory board members can provide key outside counsel and advice to family-owned businesses on potentially difficult decisions such as succession, and their input can go a long way toward smoothing the road to generational transition. Both family and independent directors of family businesses will discuss their roles within the governance of the business ... and the family.

Moderator: Jonathan Flack, Private Company Services Partner, PwC

Speakers: Darcy A. Howe, Advisory Board Member, Bama Companies; Director, Heatron; Martha Furst, Vice Chairman, Furst-McNess Company; Cynthia Watts, Director, Furst-McNess Company; Lindsay Geyer, former Chief Human Resources Officer, Port Blakely Companies

12-12:15 p.m. Conference Takeaways

Speaker: Robert H. Rock, President and CEO, MLR Holdings LLC

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

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 (on or before September 4, 2015)

First attendee from your family company: \$1,545

Each additional attendee (age 30 and above): \$1,050

Each additional Next-Generation attendee (age 29 or below): \$875

Standard Pricing (September 5, 2015 and after)

First attendee from your family company: \$1,750

Each additional attendee (age 30 and above): \$1,250

Each additional Next-Generation attendee (age 29 or below): \$1,050

Transitions conference alumni receive a 10% discount on registration fees.

Hotel Reservations: \$210 plus 13% state and local taxes, plus \$.25 commerce fee. This rate includes complimentary Internet in guest rooms. Rooms are available on a first-come, first-served basis. To make a reservation, call (877) 622-3056 and refer to the *Family Business Magazine Transitions West 2015 Conference*.

To obtain the special conference rates, hotel reservations must be made on or before the cut-off date of October 13, 2015.

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 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. 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 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)

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Number of people attending: _____

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