

# TRANSITIONS WEST 2016

November 9-11 | Pointe Hilton Tapatio Cliffs Resort | Phoenix, AZ

*The Successful and Engaged Family Business Owner*

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## Transitions West 2016 will address:

- What It Takes to Be an Effective Family Business Owner
- Developing Family Members for Governance
- The Mechanics of Ownership—Dividends, Liquidity and Transitions
- Family Dynamics Between Active and Inactive Shareholders
- Reigniting Entrepreneurship and Change in the Family Business

**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.

## 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.

# FEATURED FAMILY BUSINESS SPEAKERS

(For complete speaker biographies, visit [www.familybusinessmagazine.com/transitions](http://www.familybusinessmagazine.com/transitions))



**John Solheim**  
Chairman and CEO,  
PING



**Dan Hatzenbuehler**  
Retired Chairman  
and CEO, E. Ritter  
& Company



**Don Freeman**  
Chairman, Freeman



**Elizabeth Bloch-Uhlmann**  
Board Member,  
Marion and Henry  
Bloch Foundation



**Henry W. Bloch**  
Co-founder  
and Honorary  
Chairman, H&R  
Block, Inc.



**Stacy Mello**  
Senior Director,  
Planning and  
Communication,  
A. Duda & Sons Inc.



**William D. Carriere**  
President and CEO,  
Carriere Family  
Farms



**Steve Titus**  
Family Council  
Member, Lyles  
Construction Group



**Jerry Fat**  
President/  
CEO, Frank Fat  
Properties, Fat City  
Inc., Frank Fat Inc.



**Jamie Richardson**  
Vice President,  
Corporate Relations,  
White Castle



**Michelle Clements**  
President, Synergy  
Trust Company



**Sam Agnew**  
Director and Family  
Council Chair, The  
Agnew Company



**Martha Huber**  
Director, J.M.  
Huber Company



**Christin Cardone McClave**  
Chief People Officer  
and Board Member,  
Cardone Industries

## What Attendees Say About Transitions

"It was wonderful being able to relate to all these families going through similar issues. I learned a great deal and will be able to bring this knowledge back to my fellow G3 cousins."

"Great conference, especially in generating NextGen interest and development."

"Very relevant information in settings that were non-threatening with easy and open discussions."

"Great forum for discussion, sharing and learning that can be applied to both our family and our business."



**Scott Tucker**  
Co-President,  
Maple Leaf Farms  
Inc.



**Charley Todd**  
CEO, Ted Todd  
Insurance



**Jean-Charles Boisset**  
President, Boisset  
Family Estates



**Greg Waggoner**  
Board Member,  
Leupold & Stevens  
Inc.



**Brian France**  
Chairman and CEO,  
NASCAR

## CONFERENCE REGISTRATION RATES

### Early Registration Pricing (on or before September 2, 2016)

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

### Standard Pricing (after September 2, 2016)

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

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

The Transitions events sell out early (usually two months in advance of the event), and the hotel room block fills quickly. Please register as early as possible in order to ensure your family's attendance.

### TO REGISTER, visit

[www.familybusinessmagazine.com/transitions](http://www.familybusinessmagazine.com/transitions)

### QUESTIONS?

Contact **Justine Wood**,  
Events Director,  
[jwood@familybusinessmagazine.com](mailto:jwood@familybusinessmagazine.com) or  
(703) 850-5497



# PRELIMINARY PROGRAM

(Subject to change as speakers are added.)

## WEDNESDAY, NOVEMBER 9

2:30-6:30 pm Registration

3:30-4:30 pm Family Business Basics

5:00-6:15 pm The Effective Family Business Owner

What do family members need to know in order to be effective business owners and business partners? How can family leaders create a program to develop young family members into knowledgeable owners who work well together? How can the current generation anticipate and prevent problems that might arise among the family ownership group of the future?

Speakers: **Steve Titus**, Family Council Member, Lyles Construction Group; **Jamie Richardson**, Vice President, Corporate Relations, White Castle; **Sam Agnew**, Director and Family Council Chair, The Agnew Company

6:15-6:45 pm Opening Keynote

Speaker: **John Solheim**, Chairman and CEO, PING

6:45-9:00 pm Welcome Reception and Dinner

## THURSDAY, NOVEMBER 10

7:30 am-4:30 pm Registration Open

7:30-8:30 am Breakfast

8:30-9:45 am The Effective Family Business Board Member

What are the components of a program to develop family members into strong directors? What do independent directors need to know about the family history and dynamics so they can make the best recommendations on behalf of the shareholders? How should the board be assessed to ensure it is the right one to help the company achieve its short- and long-term goals?

Speakers: **Dan Hatzenbuehler**, Retired Chairman & CEO, E. Ritter & Company; **Martha Huber**, Director, The J.M. Huber Company; **William D. Carriere**, President and CEO, Carriere Family Farms

9:45-10:15 am Networking Break

10:15-11:30 am The Mechanics of Ownership, Dividends and Liquidity

What are the components of a dividend policy that meets the liquidity needs of family shareholders but also ensures there are sufficient funds to meet the capital and growth needs of the business? What are the pros and cons of mechanisms such as ESOPs, going public or seeking outside investors to provide needed liquidity?

Speaker: **Don Freeman**, Chairman, Freeman; **Christin Cardone McClave**, Chief People Officer and Board member, Cardone Industries

11:30 am-12:30 pm Expert Briefings

- Preparing the NextGen for Ownership
- The Transition to the Second Generation
- Effective Family Employment Policies
- Taxes, Trusts and Estate Planning
- Integrating Married-Ins into the Family

12:30-2:00 pm Lunch and Keynote Conversation

Speaker: **Jean-Charles Boisset**, President, Boisset Family Estates

2:00-2:15 pm Networking Break

2:15-3:30 pm Family Dynamics: "Active" and "Inactive" Shareholders

Several hot-button issues—such as compensation and information sharing—can cause conflict between family shareholders who work in the business and those who do not. What can a family do to prevent conflicts from occurring? What can the "insiders" do to ensure the needs of the "outsiders" are being appropriately met?

Speakers: **Greg Waggoner**, Board Member, Leupold & Stevens Inc.; **Jerry Fat**, President/CEO, President/CEO, Frank Fat Properties, Fat City Inc., Frank Fat Inc.; **Stacy Mello**, Senior Director, Planning and Communication, A. Duda & Sons, Inc.

3:30-4:00 pm Family Conversation

Speakers: **Henry W. Bloch**, Co-Founder and Honorary Chairman, H&R Block, Inc., **Elizabeth Bloch-Uhlman**, Board Member, Marion and Henry Bloch Foundation

Moderator: **Caro U. Rock**, Publisher, Family Business Magazine

4:00-5:00 pm Concurrent Sessions

6:00-9:00 pm Family Dinner

The Wrigley Mansion

## FRIDAY, NOVEMBER 11

7:30-8:30 am Breakfast

8:35-9:35am Expert Briefings

Repeats sessions from Thursday

9:35-10 am Networking Break

10:00 am-11:15 am Reigniting Entrepreneurship in the Family Business

A business family must continually assess its business model to ensure it won't be overtaken by changes in technology, in the competitive marketplace or in its customer base. How should a family balance loyalty to the founder and family tradition with the need to think entrepreneurially? What can be done to teach later-generation members about appropriate risk taking?

Speaker: **Charley Todd**, Ted Todd Insurance; **Michelle Clements**, President, Synergy Trust Company; **Scott Tucker**, Co-President, Maple Leaf Farms Inc.

11:15 am-12:00 pm Keynote Address

Speaker: **Brian France**, Chairman and CEO, NASCAR

12:00 pm-1:15 pm Conference Wrap and Lunch

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For the latest information or to register, visit [www.familybusinessmagazine.com/conference/transitions-west-2016](http://www.familybusinessmagazine.com/conference/transitions-west-2016)