Transitions West 2018
The conference for family businesses by family businesses

Register now!

TAKING THE BUSINESS FROM THE FOUNDER TO THE FUTURE

Join us at Transitions West 2018 on November 7-9, 2018 at the Ritz Carlton Marina del Rey, CA — and learn from successful multigenerational companies and experts in the family business space.

Connect with other family companies in an intimate, open environment as they share real-life problems and real-life solutions. Network with families like yours and/or host your own family meeting. You’ll have an opportunity to be a part of the collaborative and guided discussion on issues that all family businesses are facing in today’s marketplace.

Transitions West 2018 will address:
• Pivotal Moments for the Family Business
• Family: More Complicated Than It Seems
• Evolution of the Family Council
• Making an Impact as a NextGen
• Honoring Your Legacy While Innovating for the Future

TO LEARN MORE, AND REGISTER, visit:
www.familybusinessmagazine.com/conference/transitions-west-2018
FEATURED FAMILY BUSINESS SPEAKERS

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

Morrie Stevens Sr.
Chairman and CEO,
Stevens Worldwide
Van Lines

Allison Parks
Family Council
Committee Chairman,
Laird Norton

Peter Latta
Chairman & CEO,
A. Duie Pyle

Christie Lloyd Ernst
Vice President of
Property Management,
Lloyd Companies

John R. Taylor III
Chairman of the
Board, Olmsted-Kirk
Paper Company

Kathy Munson
Family Council Chair,
Crescent Electric
Supply

Peter Latta
Chairman & CEO,
A. Duie Pyle

Christie Lloyd Ernst
Vice President of
Property Management,
Lloyd Companies

John R. Taylor III
Chairman of the
Board, Olmsted-Kirk
Paper Company

Kathy Munson
Family Council Chair,
Crescent Electric
Supply

Summer Worden
President, Port
Blakely Companies
Family Council

Alex Jackson
Berkley
Assistant Sales
Manager, Frieda’s
Specialty Produce

Maggie Bender-
Johnson
President, Warren G.
Bender Company

Campbell Brown
President and
Managing Director,
Old Forester,
Brown-Forman

Ernie Patterson
VP, Director of
Family Shareholder
Relations, Brown-
Forman

Kristin Anthony
Director of
E-Commerce and
Digital, Anthony’s
Ladies Apparel

Lamar Hunt, Jr.
Founder, Loretto
Properties, LLC

Nicole Vermeer
Chair, Gary
Vermeer Family
Council, Vermeer
Corporation

Chad Hardaway
Sh carriage and
Family Council
Committee Chair,
Canal Insurance Co.

Katie Rucker
President of
Operations,
MacKenzie
Corporation

Jenny Dinnen
President of Sales
& Marketing,
MacKenzie
Corporation

Taylor Merritt
Chairman & CEO,
Merritt Aluminum
Products Company

QUESTIONS ABOUT THE PROGRAM?
Contact David Shaw, Publishing Director,
dshaw@familybusinessmagazine.com or
(301) 963-6162

CONFERENCE REGISTRATION RATES

Standard Pricing

$2,075  First attendee from your family company

$1,475  Each additional attendee (age 30 and above)

$1,150  Each additional Next Generation attendee (age 29 and below)

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

For general questions on attendance or help with registration, please contact David Shaw at (301) 963-6162. All attendees will be verified prior to acceptance of registration. A family company’s advisers may attend only if accompanied by one or more family company members. Other family company advisers may contact Mike Bachman at (215) 405-6070 for information on attending.
**WEDNESDAY, NOVEMBER 7, 2018**

**11 a.m.-3 p.m. YPO Global Family Business Network Flash Forum** (Open to YPO Family Business Network members only)

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

**3:30-4:30 p.m. Family Business Basics and Family Governance Best Practices**

An optional, complimentary pre-conference session for first-time Transitions attendees and others who wish to brush up on key family business terms and practices. A special section has been added on family governance best practices. The session will also offer tips on how to get the most out of your conference experience.

**Speakers:** Nicole Vermeer, Chair, Gary Vermeer Family Council, Vermeer Corporation; Peter Begalla, Chairman, Transitions West 2018; Deb Houden, Senior Consultant, The Family Business Consulting Group

**6:30-9 p.m. Welcome Reception and Dinner**

**THURSDAY, NOVEMBER 8, 2018**

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

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

**8:30-9:30 a.m. The Family: More Complicated Than It Seems**

In a family company’s early years, it may seem unnecessary to officially define “the family.” But if questions haven’t already arisen, they will crop up in the future. Should in-laws be permitted to work in the family business? Should only bloodline descendants own stock? Should fiancés or stepchildren be permitted to attend family council meetings? What about unmarried partners? There are no right or wrong answers to questions such as these; each family must decide policies for itself. Panelists will share how their families coped with these dilemmas, and why the results work for them.

**Speakers:** Peter Latta, Chairman and CEO, A. Duie Pyle; Summer Worden, President, Port Blakely Family Council; Chad Quist, Member, Vermeer Corporation Ownership Council

**9:30-10 a.m. Networking Break**

**10-11 a.m. Evolution of the Family Council**

What does a family council do, and why is this work important? Should the council be an elected body, or open to all? What projects or assignments fall within the council’s purview? Panelists will discuss the nuts and bolts of how their family councils operate.

**Speakers:** Katy Wilder Schaaf, Director of Development and Education, E. Ritter & Company; Kathy Munson, Family Council Chair, Crescent Electric Supply; Allison Parks, Family Council Committee Chairman, Laird Norton Company

**11-11:15 a.m. Networking Break**

**11:15 a.m.-12:15 p.m. Expert Briefings**

- Resolving Performance Problems with Family Members: Sue Bingham and Annie Snowbarger, HPWP Group
- The Purpose and Development of Key Family Documents: Nancy Drozdow, Founder/Principal, and Debbie Bing, President, CFAR
- Raising the Youngest Generation
- Transformation of the Family Enterprise: How families are using tax reform as a catalyst to implement business and enterprise change: Christina Figueroa, Personal Financial Services Tax Director, PwC
- Avoiding Intrafamily Litigation
- Shareholder Agreements
- Family Employment Policies

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

**12:30-1:45 p.m. Lunch**

**1:45-2 p.m. Networking Break**

**2 p.m.-2:45 p.m. Workshop: Managing Conflict in the Family Business**

**Session Leader:** Doug Baumoel, Founding Partner, Continuity Family Business Consulting

**2:45-3 p.m. Networking Break**

**3-4 p.m. Making an Impact as a NextGen**

NextGen family members can spark transformational positive change in the family or the business — if they’re given the opportunity. Our panel of NextGens will discuss their roles in the business and/or the family, and their relationship with senior-generation members.

**Speakers:** Alex Jackson Berkley, Assistant Sales Manager, Frieda’s Specialty Produce; Maggie Bender-Johnson, President, Warren G. Bender Co.; Kristin Anthony, Director of E-Commerce and Digital, Anthony’s Ladies Apparel
4:10–5 p.m. Intensive Workshops
- Starting Those Difficult Conversations: Jeff Strese, Chief Talent and Learning Officer, and Micahl Wester, Director, Client Advisory Team, Tolleson Wealth Management
- Shareholder Buyouts
- Investing Outside the Family Business
- Challenges of G4 and Beyond: Joshua Nacht, Consultant, The Family Business Consulting Group

6:30–9 p.m. Family Dinner at family-owned Killer Shrimp
Speaker: Brett Doherty, COO, Killer Shrimp

FRIDAY, NOVEMBER 9, 2018
7:30–8:30 a.m. Breakfast
8:30–9:15 a.m. Keynote Interview
Campbell Brown, President and Managing Director, Old Forester, and Ernie Patterson, VP/Director of Family Shareholder Relations, Brown-Forman
Interviewed by: Jeff Strese, Chief Talent and Learning Officer, Tolleson Wealth Management

9:15–9:30 Networking Break
9:30–10:30 a.m. Expert Briefings
Repeats sessions from Thursday
10:30–11 a.m. Networking Break
11 a.m.–12 noon Honoring Your Legacy While Innovating for the Future
How does a family build on the founder’s values and create an enduring legacy while at the same time reengineering the business for success in a rapidly changing marketplace? How might succeeding generations honor the company heritage while keeping up with the fast-paced changes of today’s market? Panelists will share their approaches.
Speakers: Chad Hardaway, Family Council Committee Chair, Canal Insurance Co.; Jenny Dinnen, President of Sales & Marketing, and Katie Rucker, President of Operations, MacKenzie Corporation; Taylor Merritt, Chairman and CEO, Merritt Aluminum Products Company
Moderator: Bryant W. Seaman III, Managing Director and Head of Private Asset Advisory, Bessemer Trust

12 noon–1 p.m. Lunch