

TRANSITIONS WEST 2014

Honoring the past and securing the future of the family enterprise

November 12-14, 2014 • Ritz Carlton • Marina del Rey, CA

Register Online: www.familybusinessmagazine.com/transitions

The conference created *for family companies by family companies*



Transitions West 2014 will focus on the theme of honoring the past and securing the future of the family enterprise. The program 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 and enterprises of all sizes and generational stages. The event is produced by *Family Business Magazine* and Stetson University's Family Enterprise Center.

Key topics to be addressed include:

- Passing the Torch: Planning a Transition to the Next Generation
- Family Leadership Roles and Responsibilities
- Raising Balanced Children
- Creating the Successful Family Meeting

Bonus: 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 article archives.

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CENTER FOR FAMILY ENTERPRISES

FEATURED FAMILY BUSINESS SPEAKERS

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



Andrew C. Taylor
*Executive Chairman,
Enterprise Holdings*



Louis P. Gentine
*Chairman,
Sargento Foods Inc.*



Barb Quasius
*Treasurer and CFO,
Windway Capital Corp.*



Sam Gault
*President,
Gault Energy & Stone*



Don Freeman
Chairman, Freeman



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



John W. Reiningger
*Chief Relationship Officer,
The Clemens Family
Corporation*



**Antonio Luis
Ferré Rangel**
*Chief Operating Officer,
Grupo Ferré Rangel*



Jim Warjone
*Chairman of the Board,
Port Blakely Companies*



Luconda Dager
*President,
Velvet Ice Cream
Company*



Nick Shepard
*Communications Director,
Smith Family Council,
Menasha Corporation*



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



Jo Anne Allen
*Trustee,
DWA 1989 Family Trust*

TO REGISTER, see
[www.familybusiness
magazine.com/transitions](http://www.familybusinessmagazine.com/transitions)

Or contact Justine Wood,
Program Manager,
justineawood@me.com or
(703) 850-5497



Conference Venue

Part of the Marriott organization, a family-controlled business, the **Ritz Carlton Marina del Rey** is a luxury hotel near Santa Monica. It is close to Venice Beach and Malibu, allowing visitors easy access to the area's numerous attractions. The hotel is located less than five miles from Los Angeles International Airport and is surrounded by fine dining, upscale shopping and an array of recreational and entertainment options.

CONFERENCE AGENDA

(Subject to change as speakers are added.)

Wednesday, November 12, 2014

2 p.m. Registration Opens

1-3 p.m. Optional Family Meetings

Facilitated sessions for families bringing eight or more family members to the conference. For information, contact Justine Wood at (703) 850-5497 or justineawood@me.com

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

(Optional pre-conference session)

A special session for first-time attendees and those wishing to brush up.

5-6:45 p.m. Opening Session

Milestones: Using Anniversaries to Celebrate and Grow the Family Business

Celebrating your family business's milestone anniversary is an exciting and fun way to develop family cohesion and vision, as well as an important tool for communicating family values and marketing your company to employees, vendors, partners and customers.

Speakers: Sam Gault, President, Gault Energy & Stone; Luconda Dager, President, Velvet Ice Cream Company; Jamie Richardson, Vice President, Corporate Relations, White Castle

Opening Keynote Address

Speaker: Andrew W. Taylor, Executive Chairman, Enterprise Holdings

7-9 p.m. Welcome Reception and Dinner



Ritz Carlton Marina del Rey

Thursday, November 13, 2014

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

8:30-9:45 a.m. Passing the Torch: Planning a Transition to the Next Generation

Members of the senior and successor generations will offer their perspectives on an effective transition process: the delicate art of retiring, and preparing to gain control. The discussion will also address methods of transferring ownership, including buyouts, gifting, ESOPs, financing and trusts.

Speakers: Don Freeman, Chairman, Freeman; Jim Warjone, Chairman of the Board, Port Blakely Companies

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

10:15-11:15 a.m. Focus Sessions

By size of family (small, medium and large), with a case study for analysis and discussion.

11:15 a.m.-12:15 p.m. Family Leadership Roles and Responsibilities

Family leadership—as opposed to running the business—is an important responsibility that is all too often undervalued. Some families recognize the key role of the family leader by compensating the family council chair. Others go so far as to elevate family leadership to a C-level position.

Speakers: John W. Reininger, Chief Relationship Officer, The Clemens Family Corporation; Barb Quasius, Treasurer and CFO, Windway Capital Corp.; Antonio Luis Ferré Rangel, Chief Operating Officer, Grupo Ferré Rangel

12:30-2 p.m. Lunch and Keynote Address

Speaker: Louis P. Gentine, Chairman, Sargento Foods Inc.

2-2:30 p.m. Networking Break

2:30-3:45 p.m. Raising Kids Successfully in a Successful Family Business

Raising kids in a successful family business is tricky. To succeed in whatever career they choose, young people must earn credibility. To succeed as future business owners, they must appreciate the legacy of the family business. To be well-adjusted individuals, they must understand the value of wealth. This panel will explore key developmental tasks, issues and successful approaches to raising

healthy kids within the family business.

Speaker: Michael Basore, President, TKM-Bengard Farms

3:45-4 p.m. Networking Break

4-5 p.m. Optional Sessions

Special interest group meetings and topic-based small-group discussions.

6-9 p.m. Group Dinner

Friday, November 14, 2014

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

8:30-9:45 a.m. Focus Sessions

- Creating a Family Social Media Policy
- Family Employment Policies and Compensation
- From Business Owner to Family Enterprise
- Mentoring the Next Generation
- Communications, Conflict and Conciliation
- Wealth Management
- Tax, Estate and Trusts
- Next Generation

9:45-10 a.m. Networking Break

10-11:15 a.m. Creating the Successful Family Meeting

There are many paths to a successful family meeting. Each family must craft an agenda that meets the needs of the family and the enterprise. Panelists will share ideas on how to make family meetings more robust, no matter how formal or informal your family meeting structure is today.

Speakers: Jo Anne Allen, Trustee, DWA 1989 Family Trust; Nick Shepard, Communications Director, Smith Family Council, Menasha Corporation; Debbie Brown, Chairman of the Board, Laird Norton Company

11:15 a.m.-12 noon Closing Keynote Address

12 noon-1 p.m. Lunch

1 p.m. Family Meeting Follow-Ups

For updated information, see www.familybusinessmagazine.com/transitions

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 Registration Pricing (Before September 13, 2014)

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 (After September 13, 2014)

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

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 13, breakfast and lunch on November 14, and a welcome registration with buffet dinner on November 12, as well as refreshment breaks.

Hotel Reservations: Our special group rate is \$259 per night (plus taxes) and is available through October 21, 2014. To reserve your room, call (800) 464-6501 and reference Transitions West.

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 \$ _____
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Please charge \$ _____ to my:

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