



# TRANSITIONS 2011:

## FAMILY GOVERNANCE, LEGACY, WEALTH AND GENERATIONAL CHANGE

**April 7-8, 2011** Grand Bohemian Hotel • Orlando, Florida

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

*Family Business Magazine* and Stetson University's Family Enterprise Center again host the **Transitions** conference, a powerful program focused on delivering information and ideas that you can put into action now in your family company, presented in an intimate environment.

**Transitions 2011** is built around three half-day sessions:

- Family Legacy as a Strategic Advantage
- Family Governance, Business Governance and the Next Generation
- Preserving Family Values and Growing Family Wealth

### WHY YOU SHOULD ATTEND

- **Family company speakers:** The focus of Transitions 2011 will be on speakers from family businesses, sharing their real-world problems and solutions.
- **Intimate, collaborative environment:** Attendance will be limited to 120 family company members.
- **Special content, sessions and rates for the next generation of your family business:** Family members aged 15-25 will work in a small group with Stetson Professor Greg McCann and current Stetson Family Business Program students to discuss the questions and concerns they have about their future in the family business.
- **Special session and rates for YPO Family Business Network Members:** Members of YPO's Family Business Network will enjoy special programming and preferred registration fees.
- **Networking with families like yours:** Speed networking, a welcome reception and meals/breaks will all feature opportunities to meet with and share ideas with other family company members.
- **Early-bird and family discounts:** Bring your family members, especially your next-generation leaders, and share your experiences.

#### Platinum Sponsor



#### Gold Sponsor



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#### Bronze Sponsors

**PITCAIRN**

UNIVERSITY OF PITTSBURGH  
**PITT BUSINESS**

**Drinker Biddle**

Joseph M. Katz Graduate School of Business

## FEATURED FAMILY SPEAKERS

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



**Ross J. Born**  
Co-CEO,  
Just Born Inc.



**Harold L. Yoh III**  
Chairman and CEO,  
Day & Zimmermann



**Thomas M. Bloch**  
Former CEO,  
H&R Block



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



**Philip A. Clemens**  
Chairman and CEO,  
Clemens Family Corp.



**Mark Peters**  
CEO, Butterball  
Farms Inc.



**Lansing Crane**  
Former Chairman and CEO,  
Crane & Company Inc.



**Charlotte Lamp**  
Port Blakely  
Companies



**Timothy B. Hussey**  
President and CEO,  
Hussey Seating



**Scott Livingston**  
President and CEO,  
Horst Engineering



**Richard C. Kessler**  
Chairman & CEO,  
The Kessler Collection



**Jim Ethier**  
Chairman of the Board,  
Bush Brothers & Company



**Mitchell Kaneff**  
Chairman and CEO,  
Arkay Packaging



**Sylvia Shepard**  
Chair, Smith Family Council,  
Menasha Corporation



**Carole Christner**  
and **David Christner**  
Owner (Carole) and  
President (David),  
DelFrisco's Prime Steak  
& Lobster

### Plus these industry experts and session leaders:

**Allison P. Shipley:** Principal, Tax  
— Personal Financial Services Practice,  
PricewaterhouseCoopers LLP

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

**Dirk Jungé:** Chairman and CEO, Pitcairn

**Ann M. Dugan:** Founder, Institute for  
Entrepreneurial Excellence, Joseph M. Katz  
Graduate School of Business, University  
of Pittsburgh

**F. Douglas Raymond III:** Partner, Drinker  
Biddle & Reath LLP

**John Benevides:** Chairman of YPO/WPO  
Family Business Network; President, Family  
Office Services, Harris myCFO

### About The Grand Bohemian Hotel



The AAA Four Diamond Grand Bohemian Hotel is downtown Orlando's landmark luxury hotel, housing more than 150 rare works of art. You will be just moments from downtown's cultural gems as well as Orlando's theme parks. The hotel is owned by Richard Kessler, one of the Transitions conference's featured speakers.

The hotel is a 25- to 35-minute taxi trip from Orlando International Airport.

#### Transitions Conference group room rates:

\$169 (plus 12.5% state and local taxes); includes  
free Internet access

Upgrade to concierge level: +\$50/night

Upgrade to suite: +\$100/night

To reserve your rooms, call (866) 663-0024, and identify group name as "Family Business Magazine/Stetson University Transitions Conference."

# CONFERENCE AGENDA

(Subject to change as speakers are added.)

## Wednesday, April 6, 2011

**3 p.m. to 6 p.m.** Registration Desk Open

**6 p.m. to 10 p.m.** Poolside  
Welcome Reception Sponsored by  
PricewaterhouseCoopers

Cocktails and Buffet Dinner

**Welcome Speaker:** Richard Kessler,  
Chairman & CEO, The Kessler Collection

Speed Networking

## Thursday, April 7, 2011

**7:30 a.m. to 8:30 a.m.** Registration,  
Breakfast and Networking — Atrium

**8:30 a.m. to 8:40 a.m.** Welcome and  
Overview of Conference Agenda

**Speakers:** David Shaw, Barbara Spector,  
Greg McCann, Peter Begalla

**Session One: Family Legacy as a Strategic  
Advantage**

*"It takes 20 years to build a reputation  
and five minutes to ruin it. If you think  
about that, you'll do things differently."*  
— Warren Buffett

**8:40 a.m. to 9:10 a.m.** Opening Keynote

**Speaker:** Ross Born, Co-CEO, Just Born Inc.  
*"How We Built and Use Our Family Brand"*

**9:10 a.m. to 10:15 a.m.** Panel: The Power  
of The Family Legacy and Brand

*What is your family legacy? Who man-  
ages it? How do you measure it? Can you  
use the family legacy/brand as a competi-  
tive advantage to manage internal family  
issues, attract and retain high-powered  
employees, develop strong relationships  
with vendors and build your business with  
customers?*

**Speakers:** Tim Hussey, President & CEO,  
Hussey Seating; Mark Peters, CEO,  
Butterball Farms Inc.

**10:15 a.m. to 10:30 a.m.** Networking  
Coffee Break

**10:30 a.m. to 11:15 a.m.** Workshop:  
Building the Family Brand/Story

*A working session devoted to outlining the  
family story, brand and reputation, and  
building tools to leverage these with share-  
holders, employees, vendors and customers.*

**11:15 a.m. to 11:45 a.m.** Legacy Keynote  
Address

**Speaker:** Mitchell Kaneff, Chairman & CEO,  
Arkay Packaging

*"Transforming Legacy into Long-Term  
Sustainability."*

**11:45 a.m. to 12 noon** Legacy Session  
Wrap-Up

**Speaker:** Barbara Spector, Editor, *Family  
Business Magazine*

**12:10 p.m. to 1 p.m.** Lunch

**Session Two: Family Governance, Business  
Governance and the Next Generation**

*"To ensure that family issues do not  
contaminate the business, build policy and  
procedures." — Craigie Zildjian, 14th-  
generation CEO, Avedis Zildjian Co.*

**1 p.m. to 1:30 p.m.** Keynote Address

**Speaker:** Lansing E. Crane, Former  
Chairman and CEO, Crane & Co. Inc.

*"Family Business Governance as a  
Competitive Advantage"*

**1:30 p.m. to 2:45 p.m.** Panel: Family  
Governance

*The role of the family council and family  
meeting in the governance of the family  
business, with a focus on strategies that  
work in the real world.*

**Moderator and session leader:** Dirk Jungé,  
Chairman & CEO, Pitcairn

**Speakers:** Charlotte Lamp, Port Blakely  
Companies; Philip A. Clemens, Chairman  
& CEO, The Clemens Family Corporation;  
Sylvia Shepard, Chair, Smith Family Council,  
Menasha Corporation; Anthony (Tony)  
Wilson, Chair, Family Senate, Bush Brothers  
& Company

**2:45 p.m. to 3:00 p.m.** Networking Break

**3:00 p.m. to 4:15 p.m.** Panel: Business  
Governance

*Sustaining and professionalizing the family  
company; boards of directors and advi-  
sory boards; professional management vs.  
owner/managers.*

**Moderator and session leader:** Ann Dugan,  
Founder, Institute for Entrepreneurial  
Excellence, Joseph M. Katz Graduate School  
of Business, University of Pittsburgh

**Speakers:** Harold Yoh, Chairman and  
CEO, Day & Zimmermann; Anne Eiting  
Klamar, M.D., President & CEO, Midmark  
Corporation; Jim Ethier, Chairman of the  
Board, Bush Brothers & Company

**3:00 p.m. to 4:15 p.m.** Next-Generation  
Breakout Session

*Family members ages 15-25 will meet  
separately with Stetson University Family  
Business Program students, under the  
guidance of professor Greg McCann,  
to discuss their questions, concerns and  
expectations about their future roles in the  
family business.*

**4:15 p.m. to 5:30 p.m.** Panel: What the  
Next Generation Wants and Needs

*Next-generation family members, Stetson  
University students, and next-generation  
experts will present a summary of the  
Next Generation breakout session to all  
attendees.*

**Speakers:** Professor Greg McCann, Stetson  
University; Jill Shipley, Director of Next-  
Generation Education, GenSpring; Alyssa  
Thompson, Chris Marlow, Nina Laureano,  
Justin Munizzi (Stetson University Family  
Business undergraduates).

**5:30 p.m. to 6:30 p.m.** YPO Family  
Business Network Wine Reception

*A special event for members of the YPO  
Family Business Network.*

**Session leader:** John Benevides, Chairman  
of the Executive Committee, Family  
Business Network of the Young Presidents  
Organization (YPO/WPO), and President,  
Family Office Services, Harris myCFO

**7 p.m. to 10 p.m.** Dinner at Del Frisco's  
Prime Steak and Lobster

*Dinner at a multi-generational, award-  
winning restaurant rated among the best  
in Orlando, and featuring a discussion with  
the family. Transportation to dinner pro-  
vided by Mears Transportation, a third-  
generation, Orlando-based company.*

**Speakers:** Carole Christner, owner; David  
Christner, president, Del Frisco's Prime Steak  
& Lobster

## Friday, April 8, 2011

**8 a.m. to 8:45 a.m.** Breakfast

**Session Three: Preserving Family Values  
and Growing Family Wealth**

*"A sound base of shared values, reinforced  
through trusting relationships, is the  
foundation on which successful financial  
and family strategies are built." — Stuart E.  
Lucas, fourth-generation heir of E.A. Stuart,  
founder of the Carnation Company*

**8:45 a.m. to 9:45 a.m.** Panel: Legacy,  
Wealth Transfer and Exit Strategies

*The role of the family office; separating the  
family and family wealth from the business  
itself.*

**Speaker:** Allison P. Shipley, Principal, Tax  
– Personal Financial Services Practice,  
PricewaterhouseCoopers LLP; F. Douglas  
Raymond III, Partner, Drinker, Biddle &  
Reath LLP

**9:45 a.m. to 10:45 a.m.** Panel: Leveraging  
Your Family's Other Capital

*Human and social capital, philanthropy,  
grounding your family for the next genera-  
tion, and securing your family legacy.*

**Speaker:** Thomas M. Bloch, former CEO,  
H&R Block

**10:45 a.m. to 11:15 a.m.** Networking  
Break

**11:15 a.m. to 12:15 p.m.** Panel: Control,  
Capital and the Next Generation

*A session focused on structural strate-  
gies for wealth transfer and ownership  
succession.*

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

**12:15 p.m. to 1 p.m.** Closing Keynote

**Speaker:** Philip A. Clemens, Chairman &  
CEO, The Clemens Family Corporation

*"The Family Business and the Business  
Family"*

**1 p.m. to 2 p.m.** Lunch with Conference  
Wrap-Up

*Developing a measurable action plan.*

# REGISTER TODAY!

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

Please Note: Attendance at this conference is limited to members, owners, senior executives or shareholders of family-owned businesses. Senior advisers to family businesses may attend with family members. Attendance is strictly limited to the first 120 registrants.

## Registration Fees

First attendee from your family company: \$1,495 (YPO Family Business Network: \$1,395)

Each additional attendee from your family company: \$995 (YPO Family Business Network: \$895)

Each additional Next Generation attendee (ages 15-25): \$795 (YPO Family Business Network: \$695)

Registration price includes all conference materials, as well as breakfast, lunch and dinner on April 7; breakfast and lunch on April 8; and a welcome reception on April 6, as well as refreshment breaks. Verified alumni of Stetson University receive a 10% discount on their cost of attendance.

## REGISTRATION FORM

### PERSONAL INFORMATION

JOB TITLE \_\_\_\_\_

FIRST NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_

FAX NUMBER \_\_\_\_\_

YPO Family Business Network Member?  YES  NO

I certify that I am a member, owner, senior executive or shareholder of a family-owned business.

I am an alum of Stetson University — Class Year: \_\_\_\_\_

### COMPANY INFORMATION

COMPANY NAME \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE/PROVINCE \_\_\_\_\_ ZIP/POSTAL CODE \_\_\_\_\_

PRIMARY ATTENDEE NAME \_\_\_\_\_

ATTENDEE 2 NAME \_\_\_\_\_

ATTENDEE 3 NAME \_\_\_\_\_

NEXT GENERATION ATTENDEE NAME (AGE 15-25) \_\_\_\_\_

NEXT GENERATION ATTENDEE NAME (AGE 15-25) \_\_\_\_\_

Number of people attending: \_\_\_\_\_

Total Cost (USD): \_\_\_\_\_

### PAYMENT

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

Please charge \$ \_\_\_\_\_ to my:

Mastercard  Visa  American Express

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### CREDIT CARD BILLING ADDRESS

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ADDRESS LINE 2 \_\_\_\_\_

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SIGNATURE DATE \_\_\_\_\_

BUSINESS PHONE \_\_\_\_\_ FAX \_\_\_\_\_

Please **fax** your registration form to Natasha Watts at: (386) 822-7393, or **mail** to:

Natasha Watts, Program Coordinator  
Stetson University Box Unit #7146  
421 N. Woodland Blvd., Deland, FL 32723

**Questions?** Call Natasha at (386) 822-8776 or email her at: [nwatts@stetson.edu](mailto:nwatts@stetson.edu)

**Cancellation Policy:** All conference cancellations must be made in writing and sent to Natasha Watts, Coordinator, Family Enterprise Center, 421 N. Woodland Blvd., Unit #7146, Deland, FL 32723; faxed to (386) 822-7393 or emailed to [nwatts@stetson.edu](mailto:nwatts@stetson.edu). Registrants who cancel more than four weeks prior to the program date are entitled to a full refund of the registration fee; if canceled within four weeks, but more than one week prior to the conference date, 50% of the conference registration fee will be refunded; 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.