

ANNUAL RETREAT

September 16–17, 2011 • Outrigger Reef on the Beach

Friday, September 16

8:30 a.m. to 7:30 p.m. (lunch and evening reception provided)

Saturday, September 17

8:30 a.m. to 2:00 p.m. (breakfast and lunch provided)

See attached agenda. Members will have the opportunity to meet with David Bork for 30 minute private one-on-one consultations. The consultation schedule and sign-up instructions will be emailed to the FBCH listserv.

VENUE

Outrigger Reef on the Beach
2169 Kalia Road, Honolulu, HI 96815
www.outriggerreef.com

ACCOMMODATIONS

The Outrigger Reef is offering a group rate of \$159 (plus taxes). Make reservations directly at 1 (877) 863-6860 by **Aug. 31, 2011**. Be sure to mention the UH Family Business Center.

REGISTRATION

Members: Family businesses may register a total of four people at free-of-charge. Non-family businesses may register a total of two people at free-of-charge.

Non-members: \$650.00 per person

Registration deadline is Tuesday, Sept. 6, 2011. See attached form. Registration fee does not include accommodations.

MORE INFORMATION

Please contact Krystal Lee, program manager, at 956-5092 or krystals@hawaii.edu.

ABOUT THE SPEAKER



David Bork Founder, Aspen Family Group

David Bork is an original pioneer in the field of family business consulting and is among the world's leaders in counseling family businesses. Since 1968, he has assisted over 400 families in charting their way through every imaginable family business issue.

David is a proponent of the Family Systems Approach to family business and pioneered the integration of Family Systems Theory with sound business practice. Bork's profile of the families who practice constructive behaviors – who remain "positively connected" and successful in business – has been researched and validated by objective, university-based studies. He encourages clients to take the long view in their business planning, a strategy that has served them very well.

To learn more about the speaker, visit his website at www.davidbork.com.

UNIVERSITY OF HAWAI'I AT MĀNOA

SHIDLER

COLLEGE OF BUSINESS

• International Excellence •

Family Business Center of Hawai'i

Shidler College of Business
2404 Maile Way
Honolulu, HI 96822

Web: www.fbcofhawaii.org

Email: fbch@hawaii.edu

Phone: (808) 956-5092

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TENTATIVE AGENDA

Pre-retreat • Thursday, September 15, 2011

- 8:00 a.m. – 12:00 p.m. One-on-one Private Consultations - 30 min. each [Voyager Board Room]
3:00 p.m. – 5:00 p.m. One-on-one Private Consultations - 30 min. each [Voyager Board Room]

Day 1 • Friday, September 16, 2011

- 8:30 a.m. - 8:45 a.m. **Opening** [Diamond Head Terrace 1, 2, 3]
Participant Introductions
Review program
- 8:45 a.m. - 9:45 a.m. **“Ten Keys to Success in Family Business”**
The Qualities of families who remain “positively connected” and in business
-*David Bork, Founder of Aspen Family Group*
- 9:45 a.m. - 10:00 a.m. Break
- 10:00 a.m. - 11:00 a.m. **“The Luck Family Story”**
-*Wanda Ortwine, Chief Family Officer of Luck Stone Corporation*
- 11:00 a.m. - 11:15 a.m. Break
- 11:15 a.m. - 12:30 p.m. **“Values Based Leadership at the Luck Companies”**
What unfolded when the Luck family committed to deliberate use of their values in operation of their business.
-*Mark Fernandes, Chief Leadership Officer of Luck Stone Corporation*
- 12:30 p.m. - 1:30 p.m. **Lunch**
Presentation on Asset Protection Trust
-*Bank of Hawaii*
- 1:30 p.m. - 2:15 p.m. **“FBCH Members Discuss VBL - Kelley and Morgan Family Representatives”**
-*David Bork, Mark Fernandes, Wanda Ortwine*
- 2:15 p.m. - 3:45 p.m. **Exercises “Finding Your Core Values”**
-*Wanda Ortwine, Mark Fernandes*
- 3:45 p.m. – 4:00 p.m. Break
- 4:00 p.m. - 4:20 p.m. **“Who is Really Here?” Cluster by Values**
-*David Bork*
- 4:20 p.m. - 4:45 p.m. **“Looking Back on Today”**
-*David Bork, Mark Fernandes, Wanda Ortwine*
- 5:00 p.m. – 6:00 p.m. One-on-one Private Consultations - 30 min. each [Voyager Board Room]
- 6:00 p.m. – 7:30 p.m. **Reception** with Heavy Pupus [Voyager Deck]

FAMILY BUSINESS CENTER OF HAWAI'I

Day 2 • Saturday, September 17, 2011

- 7:00 a.m. – 8:30 a.m. **Breakfast** at your leisure [Shorebird Restaurant]
- 8:30 a.m. - 8:45 a.m. **Opening** [Diamond Head Terrace 1, 2, 3]
- 8:45 a.m. - 9:15 a.m. **“Getting Started in Values Based Leadership”**
-*David Bork*
- 9:15 a.m. - 10:15 a.m. **“You Asked for It”**
FBCH members will respond to questions in advance of program
-*Wanda Ortwine, Mark Fernandes*
- 10:15 a.m. - 10:30 a.m. Break
- 10:30 a.m. - 12:30 p.m. **Break Out Groups/Work Session**
-*Wanda Ortwine, Mark Fernandes, David Bork*
- 12:30 p.m. - 1:30 p.m. Lunch
- 1:30 p.m. - 2:30 p.m. **“What We Have Learned About You”**
Wrap up, open questions, ideas for next steps.
-*David Bork, Mark Fernandes, Wanda Ortwine*
- 3:00 p.m. – 6:00 p.m. One-on-one Private Consultations - 30 min. each [Voyager Board Room]

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REGISTRATION FORM • Deadline: Tuesday, Sept. 6, 2011

“Family business” members may register up to four people for free. “Non-family business” members may register up to two people for free. Each additional attendee is \$650. Non-members may attend for \$650 per person. Registration does not include accommodations. Mark a check for each required meal. Mark a check under “S” if the attendee has special dietary restrictions.

Attendee's Name	9/16 Lunch	9/16 Reception	9/17 Breakfast	9/17 Lunch	S
1.					
2.					
3.					
4.					
5. ADDITIONAL					
6. ADDITIONAL					

Business/Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ E-mail: _____

Describe dietary restrictions: _____

REGISTRATION PAYMENT

- I am a paid member of the Family Business Center of Hawai'i (no registration fee).
- I am a paid member of the Family Business Center of Hawai'i and I would like to register more than four people (\$650 per additional person).
- I would like to join the FBCH now and attend the retreat (\$1,500 for family business, \$2,500 for non-family business). Enclosed are my dues.
- I do not want to join the FBCH at this time, but would like to attend the retreat (\$650). Enclosed is my check.

Make checks payable to: RCUH – Family Business Center

Submit registration form to Krystal Lee by September 6

Fax: 808-956-5107 • Email: krystals@hawaii.edu

Address: Family Business Center, Shidler College of Business, 2404 Maile Way, Honolulu, HI 96822