

REGISTER
BY
SEPTEMBER 19

© 2012. Photo courtesy of the Outrigger Reef on the Beach. Ric Noye Photography

ANNUAL RETREAT

SEPTEMBER 27 - 28, 2013
OUTRIGGER REEF ON THE BEACH

PRESENTERS

Andrew Keyt

Executive Director of the Loyola University Chicago
Family Business Center and President of FBN-USA

Greg McCann

Founder and Director of the Family Enterprise Center
Stetson University and Founder of McCann & Associates

GUEST SPEAKER

Fred Sasser

CEO of Sasser Family Holdings

BEYOND SUCCESSION PLANNING: BUILDING UNITY THROUGH A FAMILY STRATEGY

Succession planning has long been the focus of family business experts, but at best succession planning is a short-term strategy. It focuses primarily on the transition of the CEO and overlooks many other important transitions that are critical to success across generations. The transitions in the family as well as the ownership/governance systems are of equal importance. These blind spots lead to a bias that seeks to protect the business from the family rather than see the family as an asset in which to invest. This two-day workshop will explore how some of the oldest and most successful family businesses achieve success, and how you can increase your chances of success across multiple generations by building a family strategy.

We have learned that family businesses are the natural unit of economic enterprise. A growing body of research shows that family businesses are the backbone of our economy; that they take better care of their people and communities; and that they outperform non-family businesses. Yet, 66 percent of family businesses fail each generation. It used to be that one good business idea could last three generations. In today's global environment of exponential change, it takes three good business ideas to last one generation. So, how do we prepare ourselves as individuals and families to engage in this world of exponential change?

Our two-day retreat will explore the many complex transitions that are a part of the succession process. We will look at how we as families and individuals can use our values as a rudder of conviction to chart the course forward through the seas of exponential change. Participants will leave with an individual and family action plan for the future and a plan for being accountable for achieving these goals.

REGISTRATION

DUE: September 19

See attached form for details.
Registration fee does not include accommodations.

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

NON-MEMBERS: \$650.00 per person

ACCOMMODATIONS

ROOM RATE: \$195

BOOK BY: September 3

Make reservations directly by calling 1 (877) 863-6860 by September 3. Be sure to mention the UH Family Business Center. Room rate is per night and does not include taxes.

The Outrigger Reef is located at 2169 Kalia Road, Honolulu, HI 96815.

CONSULTATION

Members will have the opportunity to meet with the presenters for 30-minute private consultations. The consultation schedule and sign-up instructions will be emailed to the FBCH listserv.

QUESTIONS

Krystal Lee
Program Manager
(808) 956-5092
krystals@hawaii.edu

UNIVERSITY OF HAWAII AT MĀNOA

SHIDLER

COLLEGE OF BUSINESS

• International Excellence •

FAMILY BUSINESS CENTER OF HAWAII

Equipping, educating and celebrating families in business

Shidler College of Business • 2404 Maile Way, Honolulu, HI 96822 USA

Web: www.fbcofhawaii.org • Email: fbch@hawaii.edu • Phone: (808) 956-5092 • Fax: (808) 956-5107

ANNUAL RETREAT

SEPTEMBER 27 - 28, 2013

OUTRIGGER REEF ON THE BEACH

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	9/27 Lunch	9/27 Reception	9/28 Breakfast	9/28 Lunch	S
1.					
2.					
3.					
4.					

Company Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____

Describe any dietary restrictions: _____

REGISTRATION PAYMENT

Make checks payable to: RCUH - Family Business Center

- ☐ 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). Complete additional form.
- ☐ I would like to join the FBCH now and attend the retreat (\$1,500 for family business, \$2,500 for non-family business). My membership dues are enclosed.
- ☐ I do not want to join the FBCH at this time, but would like to attend the retreat (\$650). Enclosed is my check.

SUBMIT REGISTRATION FORM BY SEPTEMBER 19

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

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

DAY 1 • FRIDAY, SEPTEMBER 27, 2013

8:00 – 8:30 AM	REGISTRATION
8:30 – 8:45	WELCOME & INTRODUCTIONS
8:45 – 10:30	DEALING WITH EXPONENTIAL CHANGE: CHARTING THE COURSE FOR YOUR FUTURE
10:30 – 10:45	BREAK
10:45 – 12:00	CREATING YOUR PERSONAL ACTION PLAN PART I <ul style="list-style-type: none"> • Self-Assessment • The challenges: outcome & process
12:00 PM	LUNCH
1:00 – 2:30	CREATING YOUR PERSONAL ACTION PLAN PART II <ul style="list-style-type: none"> • Personal values & success • Application to managing life's transitions • Individual plans as a foundation for a family strategy
2:30 – 2:45	BREAK
2:45 – 4:30	CREATING YOUR PERSONAL ACTION PLAN PART II (CONTINUED)
5:00 – 7:00	NETWORKING RECEPTION

DAY 2 • SATURDAY, SEPTEMBER 28, 2013

7:00 – 8:30 AM	BREAKFAST AT YOUR LEISURE
8:30 – 9:45	CASE STUDY: BUILDING YOUR FAMILY STRATEGY Fred Sasser, CEO of Sasser Family Holdings
9:45 – 10:00	BREAK
10:00 – 12:00	BUILDING FAMILY UNITY - PART I: CREATING A FAMILY ACTION PLAN Breakout Group 1 – Founder to sibling transitions Breakout Group 2 – Sibling to cousin transitions and beyond <ol style="list-style-type: none"> a. How to build family unity b. Aligning values/creating vision <ol style="list-style-type: none"> 1. Aligning personal and family visions 2. Developing and communicating a clear family vision
12:00 PM	LUNCH
1:00	BUILDING FAMILY UNITY - PART II: CREATING A FAMILY STRATEGY <ol style="list-style-type: none"> a. What are the transitions that we face as a family? <ol style="list-style-type: none"> 1. Where do we get stuck? b. Developing a family strategy to navigate transitions <ol style="list-style-type: none"> 1. Deploying human, social, intellectual and financial capital 2. Communication and conflict resolution 3. Governance and decision-making 4. Leadership and next generation development 5. Ownership transitions and wealth management 6. Enterprise continuity strategy
3:00	ADJOURN



ANDREW KEYT

Executive Director, Loyola University Chicago Family Business Center and President, FBN-USA

ANDREW KEYT, MSMFT, is the executive director of the Family Business Center of Loyola University Chicago, president of the Family Business Network USA, and the president and founder of Keyt Consulting, a private consulting firm.

As executive director, Andrew has been involved in the Center's research efforts including The Loyola Guidelines for Family Business Boards, Emergency Management Transition, Family Influences on Strategic Planning, Non-Family CEOs and the Family Business, Family Shareholder Buyouts, and The American Family Business Survey. Andrew's research and writing has been increasingly focused on the critical role of family business as an essential, but undervalued contributor to healthy communities.

Having served as a manager in two family owned firms, and as member of his own family partnership, Andrew has experienced the challenges of family business firsthand. As a consultant he specializes in dealing with family conflict and communication, working with adult sibling/cousin teams, succession planning, strategic planning, and emergency management transition. A frequent speaker on family business topics, Andrew has spoken for such diverse groups as The Chicago Bar Association, The ABA National Trust School,

The Seeley Conference at Cornell University, The Northern Trust Corp., Harris Bank, The Family Firm Institute and several industry associations. As a leader in the field of family business, he has been published in magazines and journals including *Families in Business*, *Family Business* and *Family Business Review*.

He is frequently quoted by a variety of news media outlets such as, *The Chicago Tribune*, *The Economist*, *The Wall Street Journal*, *Entrepreneur Magazine*, *Smart Money Magazine*, *National Public Radio*, *ABC World News Tonight*, *CNBC.com* and *Business Newsmakers with Jack Taylor*.

Andrew received his MBA in Family Business from Kennesaw State University where he graduated with honors and was inducted into the business honor society Beta Gamma Sigma. In addition, Andrew has completed a Masters in Family Systems Theory from Northwestern University with a concentration on family business and is a cum laude graduate of Kenyon College. With a certificate in Family Business Advising, Andrew is a Fellow of the Family Firm Institute, the international professional association for family business advisors. Outside of the family business world, he currently serves as a deacon at the Fourth Presbyterian Church of Chicago.



GREG McCANN

Founder and Director, Family Enterprise Center Stetson University and Founder, McCann & Associates

As an author, educator, consultant and speaker, Greg McCann works with family enterprises in the areas of succession, communication, conflict resolution, gender issues, and with a special emphasis on helping the next generation succeed in both their careers and lives.

Greg is the founder, principal and leader of a national family business consulting firm that creates workshops, consults, publishes, and generally innovates on issues of importance to family businesses. He is also the founder and director of the Family Enterprise Center at Stetson University, where he led the effort as a professor to develop the nation's second minor and first undergraduate major in Family Enterprise.

He wrote, *When Your Parents Sign the Paychecks*, that is a part of the Family Enterprise curriculum at Stetson University. Axiom Business Book Awards awarded him a bronze medal in 2008. He recently published his second book about character and values entitled, *Who Do You Think You Are? Aligning your Character and Reputation*.

Greg was a member of the Family Firm Institute's Board of Directors from 2005-2008 and winner of FFI's lifetime achievement in family business education. Greg is an FFI Fellow, and is a member of the National Speakers Association and the Association for Managers of Innovation. He is a graduate of Stetson University and the University of Florida, College of Law. For more info: www.mccannfbconsulting.com.



FRED SASSER
CEO of Sasser Family Holdings

Sasser Family Holdings leases railway rollingstock, automobiles and light trucks in North America and Australia. Headquartered in Chicago, the company is celebrating its 85th year of operations, with 3rd and 4th generation Sasser family members active in the business. The company's success is based on the foundation values of the highest level of customer service, respect, teamwork and continuous improvement.

The company is currently managed by Fred R. Sasser, CEO, 3rd generation with one 4th generation family member in a key and growing role in the business. The company remains 100 percent owned by Sasser family members, all direct descendants or in-laws of the founder, Fred H. Sasser.

Fred R. Sasser was born in Chicago, Illinois, and received a B.S. in Mechanical Engineering from Purdue University in 1972. Starting with Chicago Freight Car Leasing in 1973, Fred served in roles from engineering to sales to fleet management until assuming the position of president in 1981, and chairman in 1983. Under Fred's direction CFCL has expanded from its base single business of leasing covered hopper cars in North America to add automobiles and light trucks in all 50 United States, as well as locomotives and railway freight wagons in Australia. Recent acquisitions have grown the US railcar repair shop network to three locations, while the

Australian business has added capabilities to build and repair railcars and repair locomotives at two locations.

Fred and his wife Pam live outside of Chicago, and have three children all married and on their own, and four grandchildren. Fred and the family have been active with numerous local charitable activities, especially Avenues for Independence which provides support to adults with developmental disabilities, Have Dreams which provides support for children with Autism, and Rainbow Hospice. The Sasser family also has been a continuous supporter of Opportunity International, a trust bank providing micro loans in developing countries, and is the lead donor for a new trust bank expansion being commenced in India.

During his career Fred has been active with numerous industry organizations, including Chairman of the Railway Progress Institute Equipment Leasing Committee, and membership at the North American Freight Car Association (NAFCA) and Association of American Railroads Associate Advisory Board. Fred currently serves as Chairman of the Board of Directors of the Railway Supply Institute and on the board at the Equipment Leasing and Finance Association. Outside of the railway industry Fred serves on the Board of Directors of Goodheart-Wilcox Publishers, a publisher of textbooks.