



THE EVOLVING FAMILY ENTERPRISE: ROOTED IN PURPOSE, PREPARING FOR CHANGE

SEPTEMBER 12-14, 2022
12TH ANNUAL FORUM
GEORGIA TECH HOTEL AND CONFERENCE CENTER



OUR PURPOSE

Few issues are of greater importance than perpetuating a family's values, heritage, philanthropic activities, wealth and inter-generational relationships . . . but success requires thoughtful, proactive planning. The purpose of the Southeastern Family Office Forum (The Forum) is to create a peer-to-peer educational and networking opportunity in a safe, academic environment for families of significant wealth from across the country. Staffed by scholars, industry experts and family members, The Forum provides thought leadership and insight into a variety of issues through a highly interactive, thought provoking format.

Attendance is by invitation only and open only to families, senior family office executives and our select group of sponsors.

CONFIDENTIALITY & CODE OF ETHICS

Open communications, sharing of experiences, and networking are key to the success of SEFOF participants and greatly enhance their experience. However, complete confidentiality is critical to facilitating such interaction, and by registering for this program, attendees agree to keep all information in the strictest of confidence. It is also recognized that in addition to serving their own family, some families provide investment advice or other services to outside families. As part of the SEFOF code of conduct, attendees are expected to adhere to a strict no solicitation policy. Violation of this Code of Conduct will result in the immediate dismissal of the attendee with no refund of registration.



MICHAEL BRINK

FOUNDER

Michael Brink, Chair of the Southeastern Family Office Forum and proud and valued partner of Wellspring Associates in Atlanta, Georgia, passed away on April 28, 2013. Michael was a frequent speaker and author with over 30 articles published regarding wealth transfer and life insurance due diligence. He served on the editorial board of Wealth Management Business magazine and his work regarding the integration of life insurance with philanthropy is used by the American College in their Philanthropic Advisor Certification program. In addition to other professional and community involvement, Michael was past president of the Atlanta Estate Planning Council, past chairman of the Planned Giving Advisory Board for The Community Foundation of Greater Atlanta, and served on the Advisory Board for the Cox Family Business Center at Kennesaw State University.

Michael's involvement in the family office industry was extensive, as a member of the Leaders Council for the Institute for Private Investors (IPI), a former Strategic Advisor to the Family Office Exchange (FOX) and member of the Family Wealth Alliance. Through his involvement with FOX, Michael was deeply involved in the development of the first-ever survey regarding the use of life insurance by the ultra-affluent, the results of which were featured in Worth magazine.

Michael was an avid water and snow skier and was a former auxiliary member of the National Ski Patrol. He was also a former marathon runner and enjoyed coaching youth athletics.

Michael was full of life and was fully engaged in the lives of his family and friends. He possessed a rare combination of the ability to dream big and the drive to make his dreams come to fruition. His wife, Deb, and their son, Nicholas, wrote that they had never met anyone more positive, determined, trusting and forgiving. Michael left behind a beautiful legacy and is sorely missed.



DANIEL S. BOWMAN

FAMILY BUSINESS CONSULTING GROUP

Dan is an affiliate consultant who works to accomplish the long-term strategic goals of families and their businesses. He has seen tremendous results when families engage in building a decision making process founded on transparency and accountability which requires engaged listening and often difficult conversations. He works collaboratively with family members, management, and family legal, tax, and financial advisors to capture a comprehensive picture of complex issues and goals so the entire team can implement decisions.

He built his expertise over 15 years working with multiple generations and businesses. He helped multiple boards develop from the ground up in their respective roles and stages of life. He mentored multiple generations through succession planning. "Seeking first to understand" is a principle he works to develop with all people involved.

Dan uses accountability and follow up to make sure teams are on task and focused on the priorities of the family and businesses. Successful strategic planning is only accomplished with clear objectives, value based decisions, and transparent evaluation. He fosters this communication by avoiding group think, while encouraging honest assessment of results.

His broad financial background helps him serve as a primary advisor for key business operational and wealth management growth decisions. This breadth produces well thought thru income and estate tax planning coordination between multiple business and tax professionals of different generations and businesses. He has been a member of the Southeastern Family Office Forum since 2011 – serving as Chair in 2022 and several other capacities over the past 11 years, which provides access to a deep network of successful families.

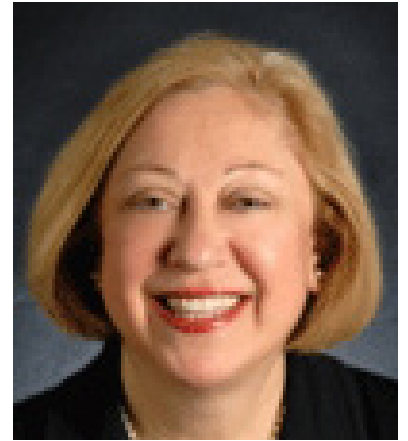
BOARD OF DIRECTORS

**GREG RAABE**

WELLSPRING ASSOCIATES

**GALEN OELKERS**

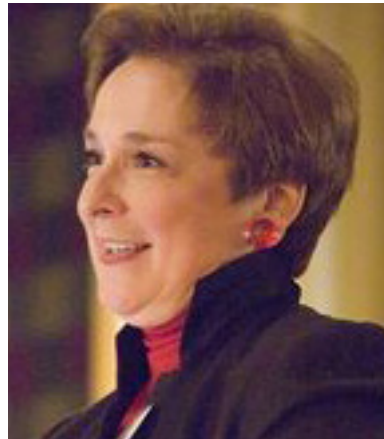
ZEIST

**MARIANN MIHAILIDIS**

M2 CONNECTIONS

**JIM KANE**

USI, INC.

**CHRISTINE GALLOWAY**RETIRED CEO OKABENA
COMPANY**DANIEL BOWMAN**FAMILY BUSINESS CONSULTING
GROUP

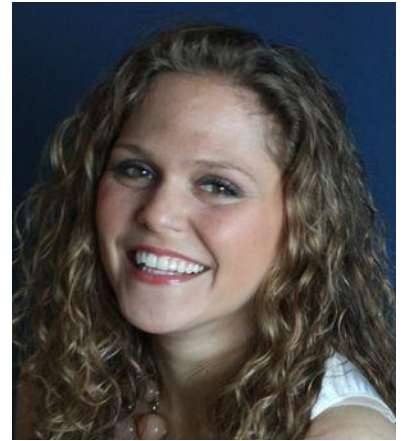
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TIBBETTS HOLDINGS



BRIAN HUGHES
HUGHES GROWTH STRATEGIES



BRYN MARS MONAHAN
RELATIVE SOLUTIONS



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7 HILLS STRATEGIES



BRIAN FRIEDMAN
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**BRYN MARS
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RELATIVE SOLUTIONS



JANE FLANAGAN
NORTHERN TRUST



WANDA ORTWINE
LUCK FAMILY OFFICE



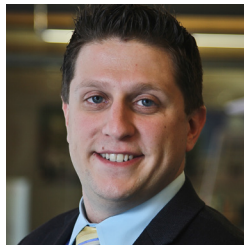
**AMELIA RENKERT-
THOMAS**
RENKERT-THOMAS
CONSULTING



MERIAL CURRIER
GATES FAMILY OFFICE



DAVID WELLS
WOODMONT
INVESTMENT COUNCIL



GRAHAM PECK
COATAILS, LLC.



JILLIAN WAGENHEIM
SERTUS CONSULTING



ANNE JONES
SIMMONS FOODS

TRACK LEADERS COMMITTEE



ANNE JONES
SIMMONS FOODS



DAVID WELLS
WOODMONT
INVESTMENT COUNCIL



JILLIAN WAGENHEIM
SERTUS CONSULTING



**AMELIA RENKERT-
THOMAS**
RENKERT-THOMAS
CONSULTING

KEYNOTE SUB-COMMITTEE



DANIEL BOWMAN
TIBBETTS HOLDINGS



BETSY BROWN
PENDLETON SQUARE
TRUST



WANDA ORTWINE
LUCK FAMILY OFFICE



BRIAN FRIEDMAN
WELLSPRING
ASSOCIATES



TOM ROGERSON
GEN LEG

TECH SUB-COMMITTEE



GRAHAM PECK
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HUGHES GROWTH
STRATEGIES



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AZIL MALAN
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HUGHES GROWTH
STRATEGIES



PATRICIA CAUDELL
COMPANY NAME HERE



LYNETTE RICKMAN
COMPANY NAME HERE



MARK THALER
THALER CORPORATION

PARTNER SUB-COMMITTEE



STEVE HERLIHY
COMPANY NAME HERE



LEE PARIS
MEADOWBROOK
CAPITAL

9/12

MONDAY

7:30 AM – 8:00 AM	Pre-conference Registration
8:00 AM – 11:00 AM	Pre-conference Workshop <i>Your Evolving Family Enterprise: Practical Tools to Understand Your Purpose and Design Your Path</i>
11:00 AM – 1:00 PM	Registration
11:30 AM – 1:00 PM	Pre-Forum Welcome & Lunch
12:30 PM – 1:00 PM	Newcomer Orientation
1:00 PM – 1:20 PM	Forum Kickoff, Welcome, and Overview Daniel Bowman, Chair of the Executive Committee & Forum Emcee
1:20 PM – 2:30 PM	Keynote Address <i>The Psychology of Money</i> Morgan Housel
2:30 PM – 3:00 PM	Break
3:00 PM – 4:30 PM	Concurrent Tracks - Session I FAMILY OFFICE <i>Family Office Foundations: Exploring the Purpose of a Family Office</i> FAMILY BUSINESS <i>Becoming Effective Owners: Moving from Trust to Competence</i> FAMILY CONNECTION AND LEGACY <i>The Future of Family Philanthropy</i> NEXT GEN <i>The Mental Toll of Covid and Coping with Family Dynamics in Family Enterprise</i> Christian Broyhill
5:00 PM – 6:00 PM	Cocktail Reception
6:00 PM – 9:00 PM	SEFOF Welcome Dinner - Georgia Tech Hotel & Conference Center
9:30 PM – 12:00 AM	Rising Gen Social - Publik Draft House

MONDAY SESSIONS

Pre-Conference Workshop

Your Evolving Family Enterprise: Practical Tools to Understand Your Purpose and Design Your Path

Scott Calhoun, Skip Perkins, David York, Tina Lovejoy

Please join us for our Pre-Conference workshop on Monday morning. This comprehensive, 3-hour session, is for those families looking to further the conversation surrounding their family enterprise, closely held business, foundations and/or next generation development. Full multi-generational families, individual family members, and family office executives are welcome to attend. Attendees will receive a printout of their Top 5 Core Values, Values Quadrant Blend, and their Core Style, which participants will have completed prior to the workshop. Participants will also see examples of how other families have incorporated their individual and collective family values into various family enterprise governance structures, mission and or vision statements, etc. These tools will help families to deepen the conversation surrounding the direction and daily decision-making of their family enterprise.

Opening Keynote Address

The Psychology of Money

Morgan Housel

Doing well with money isn't necessarily about what you know. It's about how you behave. And behavior is hard to teach, even to really smart people. Money—investing, personal finance, and business decisions—is typically taught as a math-based field, where data and formulas tell us exactly what to do. But in the real world people don't make financial decisions on a spreadsheet. They make them at the dinner table, or in a meeting room, where personal history, your own unique view of the world, ego, pride, marketing, and odd incentives are scrambled together. Award-winning author Morgan will explore the strange ways people think about money and share how to make better sense of one of life's most important topics.

FAMILY OFFICE

Family Office Foundations: Exploring the Purpose of a Family Office

John Seckman, President, Shoebox Private Trust Company

Kim Kusilek, CFO, HRK Group, Inc.

Ryan Haning, Sr. Director, Cathy Family Office

Why would a family want to have a family office? How can it support an enterprising family? Each family office is unique, but there are certain characteristics they all share. Identifying these common traits will help answer the question of why a family might want to establish a family office. Our panel of experienced family office executives will explore the concept of family offices, the purposes they serve, and the ways in which they can support the organization and growth of a family enterprise. This session is designed to discuss some fundamental questions to consider as you create a new family office or guide the further development of your existing one.

FAMILY BUSINESS

Becoming Effective Owners: Moving from Trust to Competence

Amelia Renkert-Thomas

"I trust them." Family businesses are built on trust from their very first days. However, as the business and the family grow, trust can become an unquestioned proxy for competence, with the result

that the ownership group fails to develop the experience, skills and abilities needed to achieve their vision of success. This presentation will focus on the four competences of an effective owner, how family business owners can develop them, and how to instill a culture of competence over generations. Sneak preview: getting an MBA doesn't move the needle much!

FAMILY CONNECTION & LEGACY

The Future of Family Philanthropy

Jumi Falusi Samen

The last two years have had a dynamic impact on family philanthropy. Global health, humanitarian and economic crises, reinvigorated movements for racial and social justice and widespread environmental disasters have called family philanthropies to give with greater urgency, scale, flexibility and equity. Combined with ongoing generational transitions of leadership and emerging Gen-Z givers, multigenerational engagement in grantmaking continues to evolve in new and surprising ways. This panel will consider how Family Philanthropy evolved in recent times and what this tells us about its future. Panelists will include philanthropic advisors and family grantmakers in a dynamic discussion about the next wave of philanthropy.

NEXT GEN

The Mental Toll of Covid and Coping with Family Dynamics in Family Enterprise

Cody DuBuc

The past two years have seen an astronomical increase in individuals reaching out for mental health support. It is estimated that one-third of individuals who have been diagnosed with COVID-19 have been diagnosed with mental health or neurological disorders within six months of infection. In the meantime, while communication while out of office has become more accessible, many of us have lost touch with what it means to have meaningful face-to-face conversation. As we sit with this current stage of pandemic, many find themselves re-evaluating what they want moving forward in life and still struggling with the various societal shifts. In this panel, we will discuss ways to acknowledge our personal mental health while also seeking to have healthy and life-giving connections within family members and friendships. Individuals who attend this event will walk away with tangible tools and increased vocabulary related to mental health and communication with others.

9/13

TUESDAY

6 :00 AM – 6:45 AM	Morning Run/Walk
7:15 AM – 8:15 AM	Continental Breakfast
7:15 AM – 8:15 AM	Pre-Arranged One-on-One Meetings
8:15 AM – 8:30 AM	Opening Remarks
8:30 AM – 9:30 AM	Keynote Address <i>The Family Practice of Entrepreneurship</i> Matt Allen
9:30 AM – 10:30 AM	Networking Break
10:30 AM – 12:00 PM	Concurrent Tracks - Session II FAMILY OFFICE <i>Succession Stories - Lessons Learned from Former Family Office CEOs</i> FAMILY BUSINESS <i>Family Business Governance for Where You Are</i> Kiki Mahar FAMILY CONNECTION & LEGACY AND FAMILY BUSINESS JOINT BREAKOUT <i>How to Have Difficult Conversations</i> NEXT GEN <i>Inspiring Entrepreneurialism: Honoring Legacy and Building for the Future</i>
12:00 PM – 1:00 PM	Lunch
12:00 PM – 1:00 PM	Optional Breakout <i>Faith & Family: Leaving Our Spiritual Legacy to the Next Generation</i> Dr. Richard Blackaby
1:00 PM – 2:00 PM	Plenary <i>Navigating Change While Making Change</i> Facilitated by Danielle Oristian-York, Luke Jernagan, Mark Reed, Josh Ireland, MC Belk Pilon
1:00 PM – 2:00 PM	Networking Break
3:00 PM – 4:30 PM	Concurrent Tracks - Session III FAMILY OFFICE - A <i>A Powder Keg With a 40-Year Fuse: Stories of Restructuring and Unwinding a Family Office</i> FAMILY BUSINESS <i>Being a Next-Gen in the Board Room</i> Bailey Cloudman, Gardner Peck, Katy Weiler Schaaf FAMILY OFFICE - B <i>The New Era of Talent and What It Means in the Family Office</i> FAMILY CONNECTION AND LEGACY <i>Challenges and Opportunities for Financially Diverse Couples</i> NEXT GEN <i>Now Gen and Next Gen Sharing: "What I Wish I Knew Coming In"</i>
5:00 PM – 6:00 PM	Cocktail Reception
6:00 PM	Busses Load
6:30 PM	Busses Depart
7:00 PM – 9:00 PM	Partner-Hosted Dinners

TUESDAY SESSIONS

Keynote Address

The Family Practice of Entrepreneurship

Matt Allen

How families learn, how to prepare the next generation for their individual roles in the family business, and how family members can be more entrepreneurial individually and as a family are key concepts for enduring legacy families. These concepts can create a fundamental shift in our understanding of how families learn and how business families are taught. Matt will focus us on helping families create an adaptive family culture able to navigate change. Key mileposts in that family practice of Entrepreneurship are: 1. Curiosity, 2. Empathy, 3. Creation, 4. Experimentation, 5. Reflection

FAMILY OFFICE

Succession Stories – Lessons Learned from Former Family Office CEOs

Jane Flanagan, Northern Trust

Galen Oelkers, Executive Board Member

Josh Kanter, President, leafplanner, Inc.

While succession is a normal, healthy part of every family's evolution, few family offices have written succession plans. Why is this? Many avoid the topic because change is scary, and the idea of life without their trusted family office leader is difficult to imagine. With so many families facing leadership transitions, both in their families, businesses and family offices, Northern Trust's Global Family Office Practice set out to demystify this process by interviewing over thirty former family office CEOs to collect their "succession stories." Please join us for a conversation with Jane, Galen, and Josh to hear the highlights from this research and practical advice for this important transition in a family office.

FAMILY BUSINESS

Family Business Governance for where you are

Kiki Tauck-Maha, Amelia Renkert-Thomas, Erik Allyn, and Meghan Juday

This workshop will help family business leaders tackle governance. Governance isn't "one size fits all" – the most effective governance plans are adapted to fit the specific circumstances and needs of the family. For the first 40 minutes of the session, representatives from family businesses with very different governance structures will talk about their governance: "this is how we did it." For the final 35 minutes, audience members will join breakout groups focused on different stages of governance: "how might you do it?." Handouts will include a chart to help audience members assess their own governance situation and plan proactively.

FAMILY CONNECTION & LEGACY AND FAMILY BUSINESS

JOINT BREAKOUT

How to Have Difficult Conversations

Cooper Biersach

The most important conversation you need to have is the one you're avoiding. Cooper Biersach, professor, family business consultant and coach, will lead a workshop on how to have difficult conversations. This session will look at the research on the importance of open and transparent communication, rooted in purpose. Participants will learn concepts and techniques, and then have an opportunity to practice their newfound skills through a role play exercise.

NEXT GEN

Inspiring Entrepreneurialism: Honoring Legacy and Building for the Future

Langdon Evans and Jillian Wagenheim

Many families hope continue for multiple generations, but not all actually succeed in doing so. What sets those apart that have been successful? Laird Norton's story and strategy of reaching seven generations and beyond is one of frequently asking seminal questions like, "Why should we continue to exist?" and continually preparing the next generation as family stewards. In this interactive workshop session you will have the opportunity to explore your own WHY and think about how you can implement some of their time-tested strategies in your family business and/or create new strategies that work for you.

Optional Breakout: Faith & Family

Leaving Our Spiritual Legacy to the Next Generation

Dr. Richard Blackaby

In this Faith and Family bonus session, Dr. Blackaby will be leading discussion as to the definition of spiritual legacy and guiding the participants in best practices for a most effective way of passing on our legacy of faith to our children and grandchildren.

Plenary

Navigating Change While Making Change

Danielle Oristian York, Luke Jernagan, Leela Van Balkom, MC Belk Pilon, Mark Reed, Josh Ireland

In this engaging conversation with families, hear from peers who are committed to giving and social change on what they've learned during a moment of great upheaval and tumult. What's changed and what will stay the same? Leave with ideas and inspiration to use in your own life, family and the communities where you give back.

FAMILY OFFICE - A

A Powder Keg With a 40-Year Fuse: Stories of Restructuring and Unwinding a Family Office

Rebecca Meyer, Relative Solutions

Hunt Broyhill, Broyhill Asset Management

Christian Broyhill, NextGen Journeys

Dain Kistner, Pitcairn Family Office

In this session we will focus on stories of restructuring and unwinding a family office. Multi-generational family offices have a lifecycle and often face the need to restructure or unwind, whether a result of or forward-thinking planning, changing needs, family dynamics, or a sudden life event. Hunt and his daughter Christian will share their recent story of unwinding and redesigning their family's office. Dain will share how the Pitcairn family office has moved through the process of restructuring several times. Join Rebecca and the panelists for an interactive discussion around what was done well and not so well, along with considering questions about when is it time to unwind or restructure and how to know.

FAMILY BUSINESS

Being a Next-Gen in the Board Room

Anne Eiting Klamar

In this panel discussion, individuals who have been next generation family directors on the board of their family's business will discuss their experiences. Topics will include preparation, orientation,

TUESDAY SESSIONS

speaking effectively in a board meeting, and navigating generational issues. This session will be moderated by Anne Eiting-Klamar, former family CEO and current chair of Midmark Corporation, once a next gen in the boardroom and currently bringing in G5. This highly interactive session is for family office leaders and family members to learn about the recent significant shifts in the talent marketplace and how you can adapt your family office to make sure you attract, retain, and develop the caliber of talent you need. What has worked for family offices in the past – whether it's how you lead, compensation and benefits, or the overall employee experience – may not be enough in the face of labor shortages, workforce shifts, and changing expectations. As an HR leader with over twenty years of experience and who consults exclusively to family offices, Cassie will get us grounded in the realities of today, provide actionable ideas for change, and call on you to hear what is top of mind so we can rethink the family office together.

FAMILY OFFICE B

The New Era of Talent and What it Means in the Family Office

Cassie Atteberry, Principal, Talent Outside the Lines

This highly interactive session is for family office leaders and family members to learn about the recent significant shifts in the talent marketplace and how you can adapt your family office to make sure you attract, retain, and develop the caliber of talent you need. What has worked for family offices in the past – whether it's how you lead, compensation and benefits, or the overall employee experience – may not be enough in the face of labor shortages, workforce shifts, and changing expectations. As an HR leader with over twenty years of experience and who consults exclusively to family offices, Cassie will get us grounded in the realities of today, provide actionable ideas for change, and call on you to hear what is top of mind so we can rethink the family office together.

FAMILY CONNECTION & LEGACY

Challenges and Opportunities for Financially Diverse Couples

David Wells

As Family Enterprises grow and evolve, one dynamic the family must prepare for is the welcoming of in-laws into the family mix. In addition to financial planning considerations, such as prenuptial agreements, are the very real human dynamics of welcoming (or not!) new members into the family. Research shows that marriages between spouses of differing levels of wealth face unique challenges - in some cases seeing higher rates of infidelity and divorce.

NEXT GEN

Now Gen and Next Gen Sharing: "What I Wish I Knew Coming In"

Amelia Renkert-Thomas, Meredith Thomas Straight, Katie Surface, Frank Surface

Even for those who have grown up surrounded by family members who are involved in the family business or family office, the transition to actively participating can be an eye-opening experience. How do family members' past experiences, habits, and attitudes affect this transition, for better and for worse? How can yesterday's next gens facilitate a better experience for today's and tomorrow's rising generations? Amelia Renkert-Thomas and Meredith Thomas Straight, mother and daughter, business partners, and family business governance consultants, join others immersed in the multigenerational enterprise experience.

9/14

WEDNESDAY

7:15 AM – 8:15 AM

Breakfast

7:15 AM – 8:00 AM

Pre-Arranged One-on-One Meetings

8:00 AM – 8:15 AM

Opening Remarks

8:15 AM – 9:15 AM

Plenary

Storytelling - Exploring the Deep and Rich Impact Storytelling has on Families

Dr. Robyn Fivush, Dr. Robert Jordan

9:15 AM – 9:25 AM

Transition to Peer Group Breakouts

9:24 AM – 10:25 AM

Peer Group Breakouts

10:25 AM – 10:35 AM

Transition to Closing Keynote

10:35 AM – 11:45 AM

Closing Keynote

The Transforming Power of Generous Giving - Seven Ways of Living Generously

Brad Formsmma

11:45 AM – 12:00 PM

Wrap Up

WEDNESDAY SESSIONS

Plenary

Storytelling - Exploring the Deep and Rich Impact Storytelling has on Families

Dr. Robyn Fivush, Dr. Robert Jordan

Storytelling is often an unspoken key to a vibrant family legacy. Whether we are telling our kids stories or sharing stories of our family legacy, the impact these stories have on an individual and the family may not be appreciated immediately. Our panelists will share their experience with a wide range of individuals and families as it relates storytelling. Dr. Fivush will share the impact one on one verbal storytelling has on the identity development of individuals during their childhood year and how it shapes their future. Dr. Jordan will share the impact recording of legacy has on the families as they share their history to shape their future. These unique approaches to storytelling will demonstrate the robust nature these forms have on a family's future.

Closing Keynote

The Transforming Power of Generous Giving - Seven Ways of Living Generously

Brad Formsmma

How can you experience the joy of giving? Because we all have something to give. Beyond money or things, giving can be a listening ear, a touch, or simply the gift of time. Giving is living. Choosing to live a generous life can transform you and the world around you. Something incredible happens when giving becomes your own idea, not something you do out of duty or obligation. When you move from awareness to action, miracles happen. As you make giving a lifestyle, you'll realize you're not only loving life more, you're also creating a more generous world— a better world for all of us. Brad will share how bringing multiple generations of a family together to discuss generosity helps their story and values live on.



MORGAN HOUSEL

Morgan Housel is a partner at The Collaborative Fund.

His book *The Psychology of Money* has sold over two million copies and has been translated into 49 languages.

He is a two-time winner of the Best in Business Award from the Society of American Business Editors and Writers, winner of the New York Times Sidney Award, and a two-time finalist for the Gerald Loeb Award for Distinguished Business and Financial Journalism. He serves on the board of directors at Markel.

Morgan has presented at more than 100 conferences in a dozen countries.

Keynote Address: The Psychology of Money

MONDAY, SEPTEMBER 12 | 1:20 PM – 2:30 PM



MATT ALLEN

Matt Allen is an Associate Professor of Entrepreneurship and the Faculty Director for Family Learning at the Institute for Family Entrepreneurship at Babson College. Matt teaches entrepreneurship and family entrepreneurship courses at the undergraduate, graduate and executive levels and is the creator of the Family Entrepreneurship Amplifier Program, a unique family development program focused on building entrepreneurial capabilities within families. Matt's research is focused on how families learn and how entrepreneurship can be passed from one generation to the next. His work has been published in the Harvard Business review multiple academic journals. Matt recently published a book entitled: *Family Entrepreneurship: Insights from Leading Experts on Successful Multi-Generational Entrepreneurial Families*. The family is the basic social unit for every person across every culture and country. Nearly all individuals live with families, in one form or another. A new Global Entrepreneurship Monitor report authored by Babson College professors Donna J. Kelley, William B. Gartner and Matt Allen looks at the family's contribution to entrepreneurship across the world. Across 48 economies participating in this report, 75% of entrepreneurs indicated that their family was involved in starting their businesses, either as co-managers and/or co-owners. These are family entrepreneurs.

Keynote Address: The Family Practice of Entrepreneurship

TUESDAY, SEPTEMBER 13 | 8:30 AM – 9:30 AM



DR. ROBYN FIVUSH

Robyn Fivush is the Samuel Candler Dobbs Professor of Psychology and the Director of the Institute for the Liberal Arts. She received her PhD from the Graduate Center of The City University of New York in 1983, was a Post-Doctoral Fellow at the University of California, San Diego from 1983-1984, and joined the Emory faculty in 1984. Her research focuses on autobiographical memory and narrative identity, exploring how each of us remembers our past experiences and shapes them into the story of “me.” Her research investigates the relations among memory, narrative, identity, trauma, and coping. She is a Fellow of both the American Psychological Association and the Association of Psychological Science, and has published over 150 books, book chapters, and articles. Her most recent book is *Family Narratives and the Construction of an Autobiographical Self*, 2019, from Routledge.



DR. ROBERT JORDAN

Robert H. Jordan, Jr., is a retired, weekend anchor for WGN-TV’s News at Nine. Jordan’s journalism career has spanned close to 50 years and has showcased his exceptional writing and verbal communication skills. Jordan recently published his first book, entitled, “Murder in The News: An Inside Look at How Television Covers Crime.” During the Fall Quarter of 2014, Jordan was the first Journalist-in-Residence at the University of Chicago. Jordan earned his undergraduate degree from Roosevelt University, a master’s degree from Northeastern Illinois University and a Ph.D. in Educational Leadership & Policy Studies from Loyola University in Chicago. Since retiring, Jordan has been focusing his energy on his video production company that produces luxury, documentary-style, legacy biographies for Ultra-High-Net-Worth-families across the country. These private family histories help multi-generational families preserve and protect their exceptional histories. A native of Atlanta, Ga., Jordan and his wife Sharon, a retired middle school librarian, have one daughter, Karen, who is a weekend news anchor for WLS-TV, Ch.-7, in Chicago. Karen’s husband Christian Farr is a reporter for NBC-5, TV in Chicago. The Farris have two children, a girl, Vivian and a boy, John Robert Farr.

Plenary Keynote Address: Storytelling - Exploring the Deep and Rich Impact Storytelling has on Families

WEDNESDAY, SEPTEMBER 13 | 8:15 AM – 9:15 AM



BRAD FORMSMA

Brad Formsma, founder and CEO of I Like Giving, which inspires a lifestyle of generosity in businesses, families, and schools. Brad hosts the top-rated leadership podcast “The WOW Factor” and is “A speaker you shouldn’t miss the opportunity to see” according to Forbes Magazine. He is the author of two best-selling books, “I Like Giving: The Transforming Power of a Generous Life” and “Everyday Generosity: Becoming a Generous Family in a Selfie World.”

I Like Giving initiatives have impacted more than 130 million people across the globe to live generously. To train and empower the next generation, Brad recently launched “The Generosity Roadmap,” an elementary school program that teaches students how to live generously.

Closing Keynote Address: The Transforming Power of Generous Giving - Seven Ways of Living Generously

WEDNESDAY, SEPTEMBER 13 | 10:35 AM – 11:45 AM

PRE-CONFERENCE WORKSHOP SPEAKERS



SCOTT CALHOUN

Scott Calhoun is Managing Director for the Family Office division of Ronald Blue Trust.

As Managing Director, Scott oversees the growth and expansion of the Family Office division. In addition to his leadership role, Scott has over 25 years experience helping families intentionally design a multi-generational plan for transferring the social, spiritual, and financial capital necessary for the family to thrive. His biblical worldview and uncommon approach in the areas of financial, estate, trust, and investment planning emphasize a principle driven wealth transition that properly prepares and equips each generation.

Prior to joining Ronald Blue & Co. (the predecessor company to Ronald Blue Trust) in 2013, Scott worked as the Executive Vice President of Glenmore Advisors LLC, Regional Director of Convergent Wealth Advisors, and with Synovus Family Asset Management as a Director of the Financial Strategies Unit. He has spoken frequently for the Family Office Exchange (FOX) and other associations on several different topics including Opportunities and Challenges in the Fixed Income Markets and Cutting Edge Developments in the Interaction between Different Disciplines in Private Wealth Management. Scott is also a former United States Marine.

Scott graduated from the University of Georgia with a Masters of Accountancy (Tax) and a BBA (Accounting). He is a Certified Public Accountant (CPA), a CERTIFIED FINANCIAL PLANNER™ professional, a Personal Financial Specialist (PFS), a Certified Investment Management Analyst (CIMA®), and a Certified Wealth Strategist® (CWS®).

Active in his community, Scott is a board member of the Fellowship of Christian Athletes of East Cobb County and previously served on the University of Georgia, Terry College of Business Alumni Board. He is a member of the Atlanta Estate Planning Council and is also a Children's Healthcare of Atlanta (CHOA) Legacy Advisor.

Scott and his wife, Tiffany, have two children and live in Marietta, Georgia.



SKIP PERKINS

Skip has more than 15 years experience helping families intentionally design a multi-generational plan for transferring the social, spiritual, and financial capital necessary for the family to thrive. His biblical worldview and uncommon approach in the areas of financial, estate, trust, and investment planning emphasizes a principle driven wealth transition that properly prepares and equips each generation.

PRE-CONFERENCE WORKSHOP SPEAKERS



DAVID YORK

David R. York is an Attorney, Certified Public Accountant and Managing Partner with the Salt Lake City law firm of York Howell & Guymon. David practices law in the areas of estate planning, tax, business planning, and non-profit entities. He is a Fellow with the American College of Trust and Estate Counsel (ACTEC) and is the Dean of Legacy with the Purposeful Planning Institute. David has extensive experience in designing and implementing advanced wealth planning strategies for high net worth clients. David has spoken to hundreds of public groups and professional organizations, including the TedXSaltLakeCity, Q Commons, the Hawaii Tax Institute the Purposeful Planning Institute, Investments and Wealth Institute, Valmark Member Summit, the Southeastern Family Office Forum and the Million Dollar Roundtable.

He is the co-author of two books, *Entrusted: Building a Legacy That Lasts* and *Riveted: 44 Values that Change the World*, which after its release was the #1 Business Ethics book on Amazon. He also created the game *Experience Rivets™*, which helps individuals, families and businesses identify their unique and shared core values to assist them with holistic wealth transfer, effective estate planning and team building. He has also written for *Trusts & Estates Magazine*, *Estate Planning Magazine* and *Investments and Wealth Monitor*. In 2017, YHG was recognized as an Inc. 5000 Company.

David currently serves on the Board of Directors of Holding Out HELP and Healing Nations. He lives in the Salt Lake City, Utah area with his wife Mindy and their five children, Emma, John, Samuel, Hudson and Avery. He enjoys biking, skiing, softball, writing and photography.



TINA LOVEJOY

Tina Lovejoy joined York Howell & Guymon in 2017 as the Director of Entrusted Planning. She leads clients in In-Office Sessions, Family Retreats, and Workshops to discover their Core Values, then helps them write their Motto and Mission Statement which form the foundation of their estate plan.

Tina draws from her background in opera and freelance writing to assist clients with discovering the themes of their planning. She has sung with Utah Festival Opera, Colorado Springs Philharmonic, and Opera Theatre of the Rockies, among others. She was a vocal scholarship student at Boston University and San Francisco Conservatory of Music, and trained with Operafestival di Roma in Rome, Italy. Prior to working at York Howell & Guymon, Tina was a consultant and technical writer for businesses interested in building their marketing campaigns.

Outside of the office, Tina enjoys hiking, skiing, writing, playing the piano, attending the symphony and the opera, and reading every book about psychology and spiritual development that she can get her hands on.

FAMILY OFFICE SESSION SPEAKERS



CASSIE ATTEBERRY

Cassie Atteberry is an HR leader with over 20 years in helping make the people stuff easier.

Cassie spent 21 years in HR at Hallmark Cards, Inc, where she specialized in helping achieve their business strategy by getting the right structures, processes, cultures, people and talent processes in place. As a member of the HR executive team she influenced strategy, policy and the employee experience, and became known as a champion for diversity, equity and inclusion. A significant portion of her time was spent coaching employees, managers and working with executive leadership teams. She was also the dedicated HR support for the family office established by Hallmark's founders, which ushered her in to the family office industry.

Cassie founded her own consultancy last year, Talent Outside the Lines, to help family offices maximize the value of their people portfolio. Her services include coaching, building culture and belonging, strategic HR and organizational planning, and team and talent development.

Cassie holds a master's degree in human resources and industrial relations from the University of Minnesota, and a bachelor's degree in communications from the College of St. Catherine. She is known as high-energy, a resourceful strategic partner, avid learner, trusted confidante, and not taking herself too seriously. She enjoys time with her family and dogs and visiting her native Montana.



CHRISTIAN BROYHILL SWAN

Christian Broyhill operates NextGen Journeys, a company that seeks to bring important conversations regarding mental health and resiliency into family-owned businesses. She especially enjoys working with NextGen family members discerning their personal identity in light of their larger family success narrative. In addition to her work with families, Christian is a licensed professional counselor and maintains a private counseling practice where she serves adults navigating issues related to vocation, spirituality, and trauma.

Christian is a graduate of Episcopal High School and Furman University. She possesses a master's degree in clinical mental health counseling from Denver Seminary. She has earned two advanced counseling certificates from The Allender Center, where she received training specifically related to group facilitation. Additionally, Christian has completed Forum Fundamentals training and Moderator Training through the Young President's Organization.

Christian has one daughter named Harbour. Her hobbies include singing with the Duke Evensong Singers at Duke Chapel and spending time outdoors.



HUNT BROYHILL

Professional Responsibilities: Chairman, BMC Fund, Inc; Broyhill Family Foundation; Broyhill Investments; Partner, Capitala Finance, Director, Flagship Healthcare REIT. Civic Responsibilities: Caldwell Community College and Technical Institute Foundation; Chairman, Investment Committee. Hobbies: Aviation, Sailing, Distance Biking and Swimming, Snow Skiing SCUBA.

FAMILY OFFICE SESSION SPEAKERS



JANE FLANAGAN

Jane Flanagan is a Senior Vice President and serves as Director of Family Office Consulting in the Global Family & Private Investment Offices (GFO) Practice at the Northern Trust Company. She partners with an experienced team of subject matter experts who serve the world's wealthiest families to educate families about their options and help them find their best way forward.

Jane has been working with and learning from family leaders and family office executives for her entire career. She has interviewed hundreds of families to document best practices ranging from family communication and strategies for engaging the rising generation to family office service delivery and compensation. She has helped families decide whether it makes sense to have a family office and has consulted with others to evaluate and streamline existing operations.

Prior to joining Northern Trust as Director of Family Office Consulting in 2019, Jane was a Managing Director with Family Office Exchange for 26 years.

Jane is a Certified Professional Coach and Certified Myers Briggs (MBTI) Practitioner.



RYAN HANING

As Director of the Cathy Family Office, Ryan is responsible for overseeing the financial and operating functions of the family office. These functions include financial planning, tax planning, estate planning, real property management, risk management, and philanthropy. Ryan also spends a considerable amount of time with Gen 3 discussing various topics, but mainly just walking through life with them as a friend and advisor. Ryan also has the opportunity to serve with Roy on many Chick-fil-A, Inc. initiatives as well.

Prior to joining Chick-fil-A, Inc. and the Cathy Family Office, Ryan spent over 6 years in public accounting. In that role, he spent over 4 years working in tax; focusing on large C and S Corporations and high-wealth individuals. His primary responsibility was compliance, but he also had the opportunity to assist with tax planning strategies and overall financial planning. In addition, he spent a year-and-a-half working in audit. On the financial audit side, Ryan worked in the areas of R&D, manufacturing, and construction, and also assisted with 4 non-profit audits. Further, he spent two summers joining the ERISA compliance team in order to learn the basics of 401(k) and profit-sharing audits.

Ryan is a graduate of Clemson University and holds a bachelors and master's degree. He graduated with a Bachelor's of Science in 2004 and later earned his Masters of Professional Accountancy with an emphasis in Taxation in 2006, after spending 1 year in between interning in both industry and public accounting. He holds a CPA license in the state of Georgia.

Ryan grew up in Seneca, SC and, while attending Clemson, met his wife and best friend, Shelley. They have been married almost 11 years and have two wonderful sons, ages 8 and 6. Most of their time is spent either on the baseball field with their boys or outdoors as the entire family enjoys being outside. Ryan also enjoys Clemson football and hunting. They worship at Dogwood Church and Ryan currently serves on the State and local committees of the Rocky Mountain Elk Foundation, a charity focused on the conservation of wildlife for future generations. Additionally, he is on the Board of Sharpsburg Youth Baseball; an organization that hosts over 1,000 kids each year for both competitive and non-competitive baseball. In addition to his role on the Board, he coaches both his sons' teams each Spring, Summer, and Fall season. Professionally, Ryan serves on two committees for one of the Family's foundations – the Audit Committee (Chair) and the Investment Advisory Committee. He also serves on the Board of a fixtures and hardware manufacturing company owned wholly by the Family.

FAMILY OFFICE SESSION SPEAKERS



JOSH KANTER

As President of his family's single-family office, Josh has been responsible for the multi-generational, multi-branch family's communication, governance and education, family meeting design and facilitation, tax and estate planning, business and investment structuring, risk management, and all things family office related. As a student of multi-generational families and family offices, Josh has been a member of FOX, Forge, the Center for Family Flourishing, and various other family office groups and he has been a frequent author and panelist on family and family office topics. For the past 10 years Josh has been delivering similar services to other families and has spent much of the past 20 years sharing what he has learned and helping families avoid reinventing the wheel. Josh designed a document management system for his family office that is now being used by other families, and he recently launched leafplanner, a digital document and information sharing platform designed to replicate the creation of his own family's "owner's manual," a resource that helps identify blind spots, share information, educates family members and advisors, and provides a more holistic succession of information for families. Josh is also a Director and Vice President of the Kanter Family Foundation and he has served on the boards of numerous for-profit companies and nonprofit organizations. Josh received his J.D. from the University of Chicago in 1987. He earned a BA/BS in Economics (magna cum laude) and Political Science from Emory University in 1984.



DAIN KISTNER

Dain Kistner is Director of Strategy at Pitcairn. Dain is responsible for coordinating the firm's strategic planning and business process improvement initiatives across all aspects of the business. He also serves on the Operating and Executive committees. A fifth generation Pitcairn family member, Dain is an elected member of Pitcairn's Board of Directors, and serves on the Family Council, which he chaired for 10 years.

Before assuming his current role, Dain was Pitcairn's Chief Information Officer and led the information technology team. He managed all information systems and technology-based activities at Pitcairn, including: systems design, programming, network planning, database management, web delivery, and computer operations.

Prior to joining Pitcairn in 1999, Dain was Vice President at Bedminster Bioconversion Corporation. He served in a marketing capacity and was responsible for maintaining relationships with technology licensees, negotiating, drafting and approving new license agreements, and managing public relations and communications needs.

Dain has a BA in Economics from Colgate University and an Executive MBA from Villanova University. In 2009, he was nominated for the Family Wealth Alliance 40minus Award, which honors executives under 40 years that are leaders in the wealth management and multi-family office industry.



KIM KUSILEK

Kim T. Kusilek is COO of HRK Group, Inc., a single-family office, and HRK Trust Company, a private trust company chartered for the Andersen Windows Family. HRK provides integrated financial services to fourth through sixth generation family members. Kim's primary responsibilities are to organize and execute the Financial Services for each family member, which includes tax planning and compliance, financial reporting, investment accounting and reporting, and risk management. In addition, she acts as an advocate and trusted advisor for all her clients in their pursuit of financial prosperity.

Kim worked in the Tax Department at Andersen Windows before joining HRK in 1996. She began her career at KPMG.

Kim has a bachelor's degree in Accounting and is a Certified Public Accountant. Kim is married with two children and in her free time enjoys hiking, kayaking, sport activities, gardening, and reading.

FAMILY OFFICE SESSION SPEAKERS



REBECCA MEYER

Rebecca brings unique experience as a family office professional to guide families who share assets as they navigate complexities. She helps them develop a deeper capacity to collaborate more effectively through change. Rebecca partners with families to help them align their human and financial capital with the family's broader purpose. A key part of her work is preparing next generation family members to take on new roles in the family enterprise.

Prior to joining Relative Solutions, Rebecca spent 15 years in the Family Office industry, most recently as Managing Director at Pitcairn, where she advised the firm's largest families on governance and human capital development and built a curriculum for family learning. She also consulted at the Center for High Impact Philanthropy at the University of Pennsylvania, writing a guidebook for social impact investors.

Rebecca earned her BA from the University of Pennsylvania and her MBA from the University of Maryland. She trained at the Bowen Center for the Study of the Family, is a 21/64 Certified Advisor, and a member of the Family Firm Institute (FFI).



GALEN OELKERS

Galen Oelkers is the Chief Investment Officer for the Zeist Company, an Atlanta family office which Galen joined in 1999. Previously he served as President before stepping down in 2020 as part of a planned leadership succession. Galen is also a Director and EVP for The Daniel Island Company, a Charleston planned community developer. Prior to Zeist, Galen served in various capacities, including principal non-family executive, for the Harry Bass family interests in Dallas, Texas. Galen began his career with Arthur Andersen & Co. and subsequently worked for KPMG. Galen serves as an independent director for several family offices and private trust companies. He is active in the family office community and co-founded an Atlanta family office networking group. In the civic arena, Galen serves on the Governing Board and as Investment Committee Chair of the Woodruff Arts Center and the Board of Directors and Finance Committee of the Atlanta Symphony Orchestra. Galen is a member of the Atlanta Rotary Club and is active in a number of other professional and civic organizations. Galen earned a Bachelor of Science in Business and Master of Science in Business from the University of Kansas. Galen is a Certified Public Accountant and Certified Global Management Accountant. Galen is married with three grown daughters.



JOHN SECKMAN

John serves as President of Shoebox Private Trust Company. Prior to coming to Shoebox, John was President and COO of Diversified Trust, a Tennessee chartered public trust company with over \$5 billion in assets under management and four offices across the Southeast. During his fifteen-year tenure at Diversified he established and managed the Atlanta office, led the development of family office services, created, and managed two hard asset investment partnerships and led the conversion of the firm's custody, operational and reporting systems. Prior to that John served as an Investment Director of the Delta Air Lines pension fund, where he had direct responsibility for the fund's \$1.4 billion real estate and timberland portfolio. As a Director for the \$10 billion fund, John was also involved in overall asset allocation strategies, manager selection and reporting.

John started his career in commercial real estate and has over twelve years' experience in the development, leasing, and management of commercial properties in the Southeast. He received a Bachelor of Arts in Business Administration from the University of Mississippi, a law degree from the Nashville School of Law and a Master of Science from the Massachusetts Institute of Technology. John is also a Chartered Financial Analyst. John has served on numerous family business, foundation, and non-profit boards.

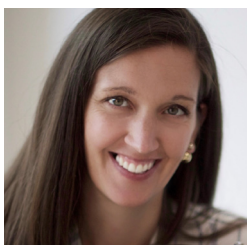
John and his wife, Lisa, have three daughters, and he enjoys hiking, boating, and spending time with his family.

FAMILY BUSINESS SESSION SPEAKERS



ERIK ALLYN

Eric Allyn is the former Chairman of the Board of Directors of Welch Allyn, Inc, a company owned by the Allyn Family for 100 years, and sold in the year 2015. Today, he is Managing Member of 50 State LLC, which manages proceeds from the Welch Allyn sale; in addition, Eric is Chief Investment Officer for 50 State, LLC, and serves as Trustee to over 75 Family Trusts. He also serves on the Board of Directors of the Allyn Family Foundation, where he has chaired the Investment Committee since 2008. Outside of his work with his family, Eric also serves on the Board of Health Care Originals; as LP Advisor to Armory Square Ventures; serves on Upstate Medical University Council; and most recently on the Board of Pathfinder Bank, a small publicly-traded bank in upstate New York. In addition, Eric is Founder and Managing Partner of two private Investment Funds, which he has managed since 2011. Eric is a past board member at GOJO (makers of Purell), Pharma Tech Industries, Eagle Dream Health, Hand-Held Products, The Gifford Foundation (Investment Committee Chairman), NYS Business Council, and Family Firm Institute (FFI). He also served on the Board of Directors Auburn Community Hospital (past-Chairman), the Hospital Trustees of New York State (Chairman), and Hospital Association of New York State (HANYS). Eric is a frequent speaker nationally and internationally on the topics of family business governance, family enterprises, philanthropy, and investment management. Eric is a graduate of Dartmouth College, and earned his MBA from University of Virginia (Darden School). He lives in Skaneateles NY with his wife Meg O'Connell (Executive Director of the Allyn Foundation), and they have three wonderful adult daughters.



BAILEY EGAN CLOUDMAN

Bailey Egan Cloudman is one of three family members representing the ownership group on the Little Rapids Board of Directors. She is also President of the Little Rapids Corp-Egan Family Foundation.

Bailey has served as a Director on the corporate board for four years, after serving three years as an apprentice board member and one year as a board observer as part of the Egan Family's succession plan. The corporate board is a seven-member plus CEO independent board. As a board member she has served on the Compensation Committee.

Bailey presently serves on a special task committee overseeing strategic planning, including mergers and acquisition. She also serves on the board's search committee, which is in the process of finding a successor to the retiring present CEO.

Bailey and Gary Cloudman are the parents of three school-age children and reside in Chicago. She grew up on Drummond Island Michigan as a third-generation owner of Little Rapids Corporation. She studied cultural anthropology, first at University of Vermont and then at New York University. She spent time living in Italy, and as part of her studies spent time in Tanzania and Indonesia. She is involved in various charitable organizations in and around the Chicago area.



ANNE EITING KLAMAR

Dr. Anne Eiting Klamar is the Chair of the Board of Directors for Midmark Corporation. She previously served as CEO of Midmark, a 4th generation family company transitioning to the 5th generation.

Klamar is an active member of the National Association of Corporate Directors. She is fortunate to serve on several boards including the Ohio State University Foundation Board of Directors, the University of Pennsylvania Dental Medicine Board of Overseers and the Family Business Magazine Editorial Advisory Board. She also sits on the Board of Directors for Little Rapids Corporation, a family-owned business in Green Bay, Wisconsin. In addition, she is the former chair and co-founder of Professional Women in Healthcare (PWH), a nationwide organization of more than 500 women in the healthcare market dedicated to furthering women's careers through mentoring, education and networking. Klamar actively serves on the Advisory Board for PWH.

FAMILY BUSINESS SESSION SPEAKERS



MEGHAN JUDAY

Speaker, author, family business, and corporate governance advocate, Meghan Juday, understands what helps family businesses thrive and survive and makes it her mission to share this know-how with the family business community. The enthusiastic champion for family businesses draws on her experience as a fourth-generation leader and Chairman of the Board at IDEAL Industries, a 106-year-old family business in its fifth generation of ownership. Meghan serves on the Kingsbury, Inc board, the Brightstar Family Business Advisory Board, and the NIU President's Advisory Council. She has published on the editorial board for Family Business Magazine, serves on the Private Directors Association Advisory Board, and writes for Private Director and Family Business Magazine and other publications. Her consultant work focuses on family and corporate governance. Meghan served as the director of the family business center at St. Joseph's University and founded The Lodis Forum, a peer group for female board chairs.



KIKI TAUCK-MAHAR

Kiki is a third generation owner of Tauck, Inc, her family's 94 year old travel company, based in Wilton, Connecticut. In that role she has helped develop and oversee the company's Board of Directors, has established multiple family and company policies related to family ownership, including Growth and Investment Policies, a Family Employment Policy, the owner's Shareholder Agreement as well as developing a system for accountability and decision making across multiple stake holders within their family system. In addition, she and her family have built a multi-generational governance structure to effectively support the family's growing enterprise activities.

Kiki serves as President of the Tauck Family Foundation whose mission it is to support the development of social and emotional skills of the children in Bridgeport, Ct so that they can reach their full potential in school and life. She thoroughly enjoys this work as well as volunteering her time with many other organizations in her community.

Kiki is a graduate of St Lawrence University and recently completed the Kellogg School of Management Executive Program: Governing Family Enterprises. She resides in Rochester, NY with her husband, Dan, and their five children.



GARDNER PECK

Gardner Peck is a third-generation owner of his family's office, Coattails LLC. Gardner also is the Executive Vice President of the family's operating business, Danville Metal Stamping Co., Inc. which is a sheet metal fabricator for the gas turbine industry. Gardner is in his 10th year with the business and has been identified as the successor to his father for Danville Metal. He is also a member of the investment committee for Coattails. Gardner graduated from Rose-Hulman Institute of Technology in Terre Haute, IN with a degree in computer engineering, and completed his MBA at the University of Illinois in Champaign, IL. Gardner enjoys spending time with his wife and their two daughters.



AMELIA RENKERT-THOMAS

Amelia Renkert-Thomas is the founder of Renkert Thomas Consulting LLC, and the author of *Engaged Ownership: A Guide for Owners of Family Businesses* (Wiley, 2015).

Renkert Thomas Consulting LLC is a U.S.-based consultancy focused on family enterprises—businesses, family offices, trusts, private trust companies, and foundations. RTC works with family enterprise owners on issues related to strategy, ownership, and governance. Amelia brings technical expertise, multi-disciplinary training, and extensive experience to governance design; business operations and strategy; law; and family systems and organizational development.

Engaged Ownership, a division of Renkert Thomas Consulting, offers training and education to family members, directors, managers, and their advisors, to improve engagement and foster more effective stewardship of family enterprises of all shapes and sizes.

A tax, trusts and estates attorney by training, Amelia co-founded Withers Consulting Group LLC in 2013, and prior to opening her consulting practice, was a Partner at the international law firm Withers Bergman LLP, where she co-chaired the firm's Family Office Group. Amelia received her B.A. from Yale College, her J.D. from Harvard Law School, and her LL.M in Taxation from the Case Western Reserve University School of Law.

FAMILY CONNECTION SESSION SPEAKERS



COOPER BIERSACH

Cooper is the co-founder of the Family Enterprise Center and an adjunct assistant professor at the University of North Carolina's Kenan-Flagler Business School. Cooper previously served as the Senior VP, Worldwide Human Resources and a member of the Executive Committee of a family-owned company, Jack Morton Worldwide, a global brand experience and communications agency during its transition and sale to a publicly traded firm.

Drawing on her experience as a non-family executive, over a decade of teaching family business coursework, and numerous consulting engagements with multi-generational families; Cooper provides leadership coaching, succession planning, governance, and communication consulting to privately held businesses and family enterprises.

Cooper is the founding director of the Carolinas Family Office Forum, a networking and educational peer group for top executives of family offices in North and South Carolina. She serves on the advisory board of the Carolina Clinic at UNC, a premier executive health program. Cooper received her BA in English at UNC-Chapel Hill, followed by her MBA and JD with honors. She holds an executive certificate in Leadership Coaching from Georgetown University's Institute for Transformational Learning and is an Associate Certified Coach with the International Coaching Federation.



JUMI FALUSI SAMEN

Jumi Falusi Samen is a Senior Director at 21/64. In her 14 year career spanning the finance, philanthropy and social sectors, Jumi has mobilized countless change agents and resources towards a more equitable world. As a Senior Director at 21/64 she serves as a trusted advisor, bridge builder, and go-to guide for philanthropists, nonprofit leaders, professional advisors and investors seeking to accelerate and fund social change. She designs and facilitates convenings among diverse decision makers to help move groups from inertia to impact.

Her thought leadership and consulting experience covers a range of complex subjects including designing giving plans, engaging next generation leaders, operationalizing collective values, strategic grantmaking, navigating family dynamics, developing endowment policies, and family foundation governance. In 2018 she joined 21/64's community of Certified Advisors and in 2021, she served on its inaugural Advisory Committee, helping to launch the Certified Advisors of Color Program and enhance the organization's trainings and tools for donors and advisors.

Prior to her work at 21/64, Jumi was a Senior Vice President and Philanthropy Advisor at Bessemer Trust as well as a financial advisor at Goldman Sachs, where she brought a comprehensive lens to advising individuals and multigenerational families and foundations on wealth stewardship strategies. As a former fundraiser for the Apollo Theater, she galvanized donors globally to amplify the multidisciplinary work of Black and Latinx artists. Across her professional and board leadership, she continues to champion and advance diversity, equity, inclusion and belonging initiatives.

After over a decade in New York City, she and her family recently relocated to the DC metro area. She's always thankful for a soulful podcast, play or playlist recommendation.



DAVID WELLS

David is a Vice President with Woodmont Investment Counsel in Nashville, TN. Prior to joining Woodmont, David was a portfolio manager at Hanson Wells Partners, a long-short hedge fund he co-founded in 2012. Previously, he was a sell-side research analyst at Thompson Research Group and Avondale Partners, covering the industrial and consumer sectors for hedge fund, mutual fund and private equity clients.

An Eagle Scout, David is a magna cum laude graduate of Wake Forest University and has completed executive education course work on family business governance at Northwestern University's Kellogg School of Management. He is a Chartered Financial Analyst (CFA) charter holder. David currently serves as Chairman of the Board of a single family private trust company where he works closely with a multigenerational family on long-term planning. As well, David is as a Board Member at Nashville Classical Charter School, a member of the Board of Traveler's Rest, a Board Member at the Exit Planning Institute's Nashville Chapter, a mentor through Pathways Women's Business Center, and serves as a Deacon at West End Community Church. He was recognized in 2017 as one of Nashville's Forty under Forty.

NEXT GEN SESSION SPEAKERS



LANGDON EVANS

Langdon is consultant to family offices, family business, and family members, helping them recognize their legacy and plan for their future. In his role at PwC, Langdon interfaces with businesses and families of all sizes. He brings a passion for family engagement, next generation education and family communication, balanced by an understanding of the business and planning requirements of a complex family system. His specific areas of focus include: family continuity planning, business/family governance, family office setup-diagnostics-and operational analysis, technology, risk analysis and more

Langdon is a 6th generation member of a 165 year old family based in Seattle, WA. Having worked with his own family business on improving communication to the shareholders and with internal governance structures, he brings his direct experience to other families.

Prior to his current role, Langdon was a Relationship manager for North and South America at Trusted Family, a digital security solution for ultra-high net worth families and family enterprises. He has also worked in his own family business, and currently is the Chair of his families' Education Committee and is a member of the Family Council Committee.



CHRISTIAN BROYHILL

Christian Broyhill operates NextGen Journeys, a company that seeks to bring important conversations regarding mental health and resiliency into family-owned businesses. She especially enjoys working with NextGen family members discerning their personal identity in light of their larger family success narrative. In addition to her work with families, Christian is a licensed professional counselor and maintains a private counseling practice where she serves adults navigating issues related to vocation, spirituality, and trauma.

Christian is a graduate of Episcopal High School and Furman University. She possesses a master's degree in clinical mental health counseling from Denver Seminary. She has earned two advanced counseling certificates from The Allender Center, where she received training specifically related to group facilitation. Additionally, Christian has completed Forum Fundamentals training and Moderator Training through the Young President's Organization.

Christian has one daughter named Harbour. Her hobbies include singing with the Duke Evensong Singers at Duke Chapel and spending time outdoors.



JILLIAN WAGENHEIM

Jillian Wagenheim is the Founder and Principal Consultant at Sertus Consulting, LLC. With over a decade of experience in the non-profit sector, she found her passion facilitating and acting as a change agent, helping nonprofits, individuals and multigenerational families explore strategic giving and next generation engagement.

Jillian is a highly respected speaker and facilitator, both nationally and internationally, on the topics of next generation engagement, innovation, values identification and generational personalities and perspectives.

Before opening her own consulting firm, Jillian was Director of Family Philanthropy at the Jewish Federation of Greater Atlanta assisting multigenerational families in meaningful and deliberate philanthropy. Prior to that, she held the position of Senior Philanthropic Advisor focusing on Next Gen Major Donors. Jillian also served as the Director of Membership Services at Ahavath Achim Synagogue, the largest and oldest Conservative synagogue in Atlanta. While there, she implemented programs focused on engaging the next generation in synagogue life which earned the synagogue national recognition with a Gold Solomon Schechter Award.

Jillian is a certified consultant/speaker for 21/64, a nonprofit specializing in multigenerational engagement in philanthropy and adjunct faculty at Kennesaw State University's Cox Family Enterprise Center. She holds a Certificate in Family Wealth Advising (CFWA) and a Certificate in Family Business Advising (CFBA) from the Family Firm Institute and a BA in Elementary Education from Michigan State University.

FAITH AND FAMILY SESSION SPEAKER



DR. RICHARD BLACKABY

Richard is the president of Blackaby Ministries International and lives in Jonesboro, Georgia. Richard travels internationally speaking on spiritual leadership in the home, church, and marketplace as well as on spiritual awakening, experiencing God, and the Christian life. Richard regularly ministers to Christian CEOs and business leaders. He has written or co-authored 35+ books, including *Experiencing God: Revised Edition*; *Spiritual Leadership: Moving People on to God's Agenda*; and *Experiencing God: Day by Day*.

PREMIUM PARTNERS



EDUCATIONAL PARTNERS



ASSOCIATION HOSTS



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