SEFOF

NAVIGATING THE FUTURE: ENGAGING FAMILIES & FAMILY ENTERPRISES IN TRANSITION

SEPTEMBER 24–26, 2018
8TH ANNUAL FORUM
GEORGIA TECH HOTEL & 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. 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 for qualified attendees. Our program is open to families and family enterprises and/or their executives.

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.

BRIAN HUGHES

PRESIDENT & FOUNDER, HUGHES GROWTH STRATEGIES, LLC

Brian has been involved in the Southeastern Family Office Forum since the founder and good friend, the late Michael Brink, discussed the idea of creating a peer to peer network for successful families in the Southeast. He has been part of the leadership of the Forum since 2012 and the Chair of the Forum since 2015. Brian has worked with hundreds of successful families and private foundations over his career and has been committed to helping families identify and solve the issues that matter most. Brian's firm, Hughes Growth Strategies, educates, trains and coaches advisors on how to engage families around these critical issues, and support their efforts to create trusted intimate relationships that deliver results.

After spending nearly 30 years as an accomplished executive in the family office and wealth management industry, Brian launched Hughes Growth Strategies, a consulting firm focused on helping advisors organically grow their firms and create lasting, successful relationships with the right clients. Prior to the launch in 2012, Brian was responsible for building and cultivating family and private foundation relationships at two privately held multifamily offices, Threshold Group and Pitcairn. He spent 15 years with Lincoln Financial Advisors where he served as regional CEO for Lincoln and Sagemark Consulting, a fee-based financial planning firm in St. Louis, MO. Brian has been a featured speaker at many family office and impact investing and wealth management programs around the country, including the Wealth & Giving Forum, Impact Capitalism, RayLign's Family Frontiers, the Family Wealth Alliance Advisor Forum, the Family Firm Institute Annual Meeting, the Family Office Symposium, Schwab IMPACT, and CFA Society of Philadelphia Private Wealth Forum. Brian holds a BS from the University of Tampa and completed the Private Wealth Management Program at the Wharton School, University of Pennsylvania. Brian and his wife Carey have two young children and reside in a Northwest suburb of Philadelphia.

EXECUTIVE COMMITTEE

BRIAN HUGHES

HUGHES GROWTH STRATEGIES

GREG RAABE

WELLSPRING

GALEN OELKERS

ZEIST

JIM KANE

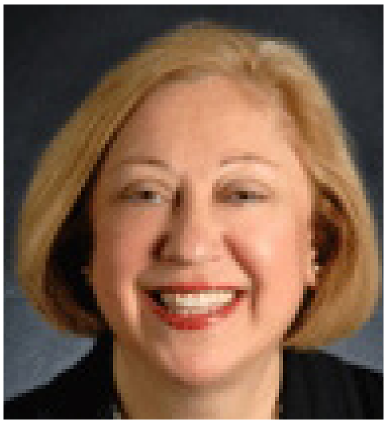
USI

ANNE JONES

SIMMONS FOODS, INC.

DANIEL BOWMAN

TIBBETTS HOLDINGS



MARIANN MIHAILIDIS

FAMILY OFFICE EXCHANGE

TEDDIE USSERY

FAMILY OFFICE MATTERS

CHRISTINE GALLOWAY

RETIRED CEO OF OKABENA COMPANY

COMMITTEE MEMBERS

ADVISORY COMMITTEE

DANIEL BOWMAN
TIBBETTS HOLDINGS

LAURA LIANG
ENTERPRISE PRODUCTS

MERIAL CURRIER
GATES CAPITAL

CHRISTINE FRANCO
CHINQUAPIN TRUST COMPANY

WANDA ORTWINE
LUCK COMPANIES

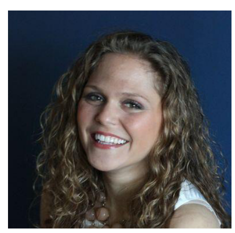
BRIAN ADAMS
SIRROM PARTNERS

MARK LONGNECKER
SOUTHERN CHAMPION TRAY

KRISTIN MARTIN
LOVE'S TRUCK STOPS

ROY JONES
CATHY FAMILY OFFICE

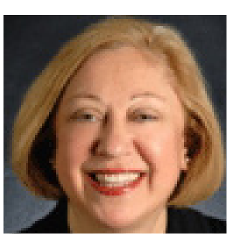
GAILEN KRUG
ALBOURNE



BRYN MARS
FOSTER HOLDINGS

CAROLINE CAMERON
AMERICAN FIDELITY

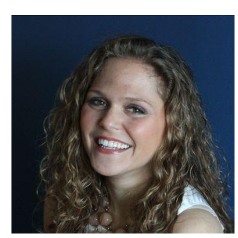
TRACK LEADERS



MARIANN MIHAILIDIS
FAMILY OFFICE

RICKY NOVAK
FAMILY BUSINESS

DANIELLE YORK
FAMILY CONNECTION



BRYN MARS
NEXT GEN

9/24 MONDAY

7:30 AM–8:00 AM	Pre-Conference Workshop Registration
8:00 AM–11:00 AM	Pre-Conference Workshop: ***Digital Awareness: The Identity Crisis*** Presented By: FamilyPath Consulting: Teddie Ussery, Melissa Malloy, Nancy Thornton
10:00 AM–12:00 PM	SEFOF Leadership Committee Meeting Speakers: Brian Hughes / Greg Raabe
11:00 AM–1:00 PM	Registration
11:30 AM–1:00 PM	Welcome Luncheon
12:15 PM–12:45 PM	Newcomer Orientation Speakers: Brian Friedman / Dan Bowman
1:00 PM–1:20 PM	Opening Remarks Speakers: Jim Kane / Brian Hughes / Greg Raabe
1:20 PM–2:30 PM	Keynote Address ***Timeless Secrets of Success: How to Inspire Loyalty, Engagement and Willingness to Go the Extra Mile*** Speaker: Mitzi Perdue
2:30 PM–3:00 PM	Break
3:00 PM–4:30 PM	Next Gen Session A ***B Corps & Family Business: Putting Purpose Into Profits*** Family Connection Session ***The Resilient Family: How Family Storytelling Can Make Your Family More Effective, Happier and Stronger*** Family Business Session ***Building Governance to Give the Family Business Owners a "Voice"*** Family Office Session ***Family Office 101*** Next Gen Session B ***Being a Good Board Member***
5:30 PM–9:00 PM	SEFOF Attendee Welcome Dinner Federal Reserve Bank of Atlanta. **Prior registration required.**
9:30 PM–10:30 PM	Next Gen Social: at ESCORPIÓN

MONDAY SESSIONS

Pre-Conference Workshop
Digital Awareness: The Identity Crisis

Presented By: FamilyPath Consulting: Teddie Ussery, Melissa Malloy, Nancy Thornton

Today's children and teens are looking for affirmation and in the wrong places. Their self-esteem and self-confidence are on a downward spiral. Today, children and teens don't see a need for a best friend when they have "Snapscores", numbers of "Likes," and numbers of "Followers." Smartphones, Gaming and Social Media are the new norm for our youth. Do you feel like you live in a foreign culture when you communicate with your child/teen? You are not alone. Communication is a lost art, replaced by social media apps and gaming. Anxiety, Depression, Self-harm, Cyberbullying, Fear of Missing Out (FoMo), and Suicidal Thoughts are on the rise. Social Media and Gaming are now considered forms of addiction and mental disorders. The Digital Age is shaping who we are and what we think. Recognizing the impact of the Digital Age on our life, both now and in the future is a vital part of guiding, growing and preserving our family legacy.

Next Gen Session A
B Corps & Family Business: Putting Purpose Into Profits

Speaker: Jennifer Muntz, FBN

As a way to engage and excite the next generation, business owning families are utilizing their company, profits and other resources to make the world a better place - creating a sustainable future. Through sustainability benchmarking, next generation are developing new mindsets on business, market disruption and breakthrough thinking. Join this session to hear about blending of social and business value, and case studies of next generation's creating impact in their businesses, communities, environment and family governance. This session is recommended for family members who hope to engage the next generation in the family enterprise and next generation who wish to have a greater impact.

Family Connection Session
The Resilient Family: How Family Storytelling Can Make Your Family More Effective, Happier and Stronger

Speaker: Jillian Wagenheim

Recent research shows that people who know a lot about their families are better able to face challenges, are stronger, more effective, and resilient. In a world that seems increasingly disconnected, being deliberate about enhancing your family's resilience should be an important step you take. In this session we will explore how family storytelling can help family members develop a strong "intergenerational self" that promotes happiness, strength and family cohesion. This session will give you a tool to start these important conversations with your family.

Family Business Session
Building Governance to Give the Family Business Owners a "Voice"

Speakers: Roy Jones, Cathy Family Office

Moderator: Marion McCollom Hampton, Sr. Partner Banyan Global Family Business Advisory

The three-circle model tells us that the intersection of family, business, and ownership roles creates complexity in family businesses. Banyan's Four-Room model builds on this foundation to show how the authority of those key family business roles can be defined and how the roles relate to one another. Designing an "Owner Room" where owners can speak into business decisions at the appropriate level is essential to long-term business survival. This panel will explore how several families are "building out" their Owner Rooms to allow appropriate engagement of family owners into the future and will offer several practical examples to show how Owner Rooms can function.

Family Office Session
Family Office 101

Speakers: Leslie Voth, Pitcairn | Steve Smitherman, The Family Office, LLC, The Family Private Trust, LLC | Ryan Haning, Cathy Family Office

Moderator: Kristin Martin

"A goal without a plan is just a wish" - Antoine de Saint-Exupéry

To chart a course of action is to plan. Proper charting is essential to achieving one's goals and is often the most difficult step in the planning process. In this session we will delve into the basics of building a family office and discuss next steps for expanding existing family offices. Each family office is unique to the family which they serve but there are also many similarities within the framework of a successful family office. Family offices grow and evolve over time which brings about change and requires flexibility in the planning model. Our experienced panel of family office executives will answer questions that may arise as one begins the journey into the unfamiliar waters of establishing a family office. Panel discussion will also offer insight on expanding existing family office structures.

Topics to be addressed include: When is it time for a family office? What are the costs of a family office? What services will the family office offer? What services should a family office consider outsourcing? What are the benefits of a MFO vs. a SFO? What basic governance documents does a family office need? What role does the family play in the family office? My family office has been in existence for a short time, what is the next step?

Family Office 101 promises to be a very interactive session between participants and panelists.

Next Gen Session B
Being a Good Board Member

Speaker: Beverly Brooks Thompson, Ph.D., CFRE, President & Executive Counsel

So, you've been elected to your board of directors, or hope to in the near future. What does that mean? How can you be a good leader, or fiscal representative of your family? This session is perfect for new board members, or those hoping to join the board of directors of a family office, business or foundation. We'll learn about the responsibilities of different types of boards, and how you can make a positive impact for your family's future.

9/25 TUESDAY

7:15 AM–8:15 AM	Continental Breakfast
8:15 AM–8:30 AM	Opening Remarks Speaker: Jim Kane
8:30 AM–9:30 AM	Keynote Address ***My Father's Business: The Small-Town Values That Built Dollar General Into a Billion-Dollar Company*** Speaker: Cal Turner, Jr.
9:30 AM–10:00 AM	Break
10:00 AM–11:30 AM	Family Office Session A ***Creating an Effective Team for the Family Office*** Family Office Session B ***Strategic Planning for the Family Office—The Difference Between Merely Surviving and Successfully Thriving*** Family Business Session ***Family Office Collaboration: Framework for Success*** Family Connection Session ***If Your Family has Drama, this Session Might be for You!*** Next Gen Session ***On-Boarding New Family Members***
11:30 AM–1:00 PM	Peer Groups Session I: Table Topics with Lunch
1:00 PM–1:30 PM	Break
1:30 PM–2:30 PM	Keynote Address ***Opportunities and Challenges for Families of Wealth After the Tax Cut & Jobs Act*** Speaker: Mark Prater
2:45 PM–4:15 PM	Peer Groups Session II: Table Topics
5:00 PM–6:15 PM	Cocktails
6:15 PM–6:45 PM	Depart for Hosted Dinners

TUESDAY SESSIONS

Family Office Session A
Creating an Effective Team for the Family Office

Speakers: Bonnie Gauger, Johnson Keland Mgmt., Inc. | Cassie Atteberry, Chinquapin Trust Co.

Moderator: Mariann Mihailidis

The biggest asset of any family office is the staff that supports the family clients. Hear from two family office human resource executives about the elements and process to consider in building an effective team that delivers the best client experience for the family. The executives will discuss leadership and team building strategies and offer practical examples to build the best team ever to support the family. The basic tenets of building an effective family office team will include leadership, assessing talent, building a team and culture. Actionable take-aways will be included that walks you through the headlines of those tenets with apply-at-home exercises and additional resources.

Family Office Session B
Strategic Planning for the Family Office—The Difference Between Merely Surviving and Successfully Thriving

Speakers: Robert Crosby, Crosby Land & Resources | Chris Galloway | Greg Rogers, RayLign Advisory

Moderator: Amy Renkert-Thomas

After a family has created wealth in a family business, they naturally want success in their family office. Understanding the strengths, weaknesses, threats and opportunities facing your family office and taking those into consideration in developing strategic goals will help your family meet its ever-changing needs. At this session, our panel will address questions such as "How do you know when you need a strategic plan?; " How do you get started?"; "What are the essential components of an effective strategic plan?"; "How do you know what the appropriate time period is to include in a strategic plan?"; "How do you develop and implement strategic goals?"; and, "How do you know if your plan is successful?". Come hear about how our panel members have faced the challenge of developing and implementing successful strategic plans.

Family Business Session
Family Office Collaboration: Framework for Success

Moderator: Ricky Novak

This session will look at the sometimes-mythical concept of family offices collaborating to more effectively and efficiently achieve a common end goal. Many people talk about this, but who is really doing it, and how are they doing it? This might involve sharing personnel resources, data/information, co-investing together or having integrated events. We will engage a panel of family members/family office execs who have engaged in successful collaboration to learn what works, what doesn't work and what they have learned from the process.

Family Connection Session
If Your Family has Drama, this Session Might be for You!

Speaker: Andrea Schara

Learn how family relationships work for better or worse, and consider strategies that can enable you to be at your best in your family and other social system. In this session you will gain greater awareness of how your family history and automatic patterns of behavior contribute to success or frustrations in important relationships. You will leave with new insights and tools that will help you navigate and stay bold and strong. We guarantee you will laugh, learn to enjoy the opposition and stay loose, so that you can be a thoughtful presence or leader in all your important relationships.

Next Gen Session
On-Boarding New Family Members

Speaker: Janet Ries Stern, Pembroke Philanthropy Advisors

Family members join their family enterprise at various points in their lives, whether as a blood relative at birth, as an adopted member of a family, or as a spouse. In this breakout we'll focus on the latter categories and learn how to navigate the difficult waters of on-boarding new family members at these stages, and best practices you can take home. This breakout is recommended for rising leaders who are worried about bringing spouses or adopted children into the fold of the larger family enterprise.

9/26 WEDNESDAY

7:15 AM–8:15 AM	Continental Breakfast
8:15 AM–8:30 AM	Opening Remarks Speaker: Jim Kane
8:30 AM–10:00 AM	Family Office Session ***Fraud in the Family Office: "That was Not My Tax Return", "The Gardener's New Wire Instructions", and "Yes I Am Sure I Paid Someone For That Sculpture!"*** Family Business Session ***Family Enterprise Strategy and Leadership*** Family Connection Session A ***Faith & Family*** Family Connection Session B ***Strengthening Bonds: Promoting Stronger Families through Compassionate and Empathic Communication*** Next Gen Session ***Rising Gen Leadership: How You Can Lead in Your Family Enterprise by Making Family Involvement a Strategic Advantage!***
10:00 AM–10:15 AM	Break
10:15 AM–11:30 AM	Keynote Address ***The Four Habits of Healthy and High Performing Families*** Speaker: Dr. John Townsend
11:30 AM–11:45 AM	Wrap Up

WEDNESDAY SESSIONS

Family Office Session

Fraud in the Family Office: "That was Not My Tax Return", "The Gardener's New Wire Instructions", and "Yes I Am Sure I Paid Someone For That Sculpture!"

Speakers: Belinda Snedden, PwC | Charlie Carr, PwC | Chris Lohse, Senior Manager Corporate Security, Enterprise Products Company

Moderator: Laura Liang

In this world of identity theft, email spoofing and fraudulent tax returns family offices can so easily become a victim. How do I balance being responsive to family members, and ensuring the office is not a victim of fraud? Where do you create checks and balances in a small or thinly staffed office? This interactive session will discuss some of the many issues family offices face, best practices to avoid scams and how to best serve family clients in this challenging time.

Family Business Session

Family Enterprise Strategy and Leadership

Speaker: Alexandre Monnier, President Family Office Exchange

There are many complexities that come with being a Family Enterprise. What starts out as a family business gradually evolves into multiple businesses, major real estate holdings, multi-generational ownership structures and investment portfolios, along with visibility in the community and in your philanthropy. Successful families need a thoughtful way to plan for, organize and oversee these complex family activities and prepare the next generation for leadership.

This presentation will show families how to: Create a shared vision for their family's future; develop a Family Enterprise mindset; define enterprise goals and strategies; understand the importance of governance; develop family learning about the enterprise .

This presentation is for families who can sense that they have grown bigger than their business and need to develop a plan for managing all of the disparate parts of their Family Enterprise, today and into the future.

Family Connection Session A

Faith & Family

Speakers: Dr. John Townsend | Lee Paris, Wellspring Group

The Faith and Family break-out session is designed to provide a safe, unique place for SEFOF participants to be able to share struggles, successes, and best practices in generationally sharing faith within our families and to take advantage of significant resources provided in our breakout sessions. The format will be through a highly interactive presentation designed to spark ideas, as well as facilitate learning and sharing from peer families. This session will provide a framework for families with a strong and active faith heritage to understand, articulate, and implement a long-term vision of "family" and life together.

Family Connection Session B

Strengthening Bonds: Promoting Stronger Families through Compassionate and Empathic Communication

Speaker: Cynthia Moe

This session will investigate how business families can strengthen connectedness by implementing some of the compassionate communication ideas of Dr. Marshall Rosenberg. The goal is to help us connect with others on the basic premise that we all have an innate desire to contribute positively to each other. Dr. Rosenberg puts forth a communication framework that focuses on: empathetically listening and honestly expressing, our observations, feelings, needs and requests. The ultimate goal is to understand how we can elevate our communication by observing without judging, thoughtfully expressing our feelings, understanding our needs, and accurately requesting actions that will meet our needs. Overlaying this framework on the Business Family environment allows us to manage conflict, better understand one another and connect more deeply.

Next Gen Session

Rising Gen Leadership: How You Can Lead in Your Family Enterprise by Making Family Involvement a Strategic Advantage!

Speaker: Greg McCann, McCann & Associates

This interactive, experiential session will focus on how the complex, rapidly changing and interdependent world is impacting how families do business together. We will introduce vertical leadership, both a new model and a new mindset for the family and family enterprise. We will discuss how you can align the family business with your values, develop the leadership in your family, while engaging the strengths of each generation.

MITZI PERDUE

Mitzi is a businesswoman, author, and a master storyteller. She holds degrees from Harvard University and George Washington University, is a past president of the 35,000 member American Agri-Women and was one of the U.S. Delegates to the United Nations Conference on Women in Nairobi. She currently writes for the Academy of Women's Health, and GEN, Genetic Engineering & Biotechnology News.

Mitzi Perdue draws on the experience of her family of origin, the Henderson Estate Company that dates back to 1890 and was the forerunner of the Sheraton Hotels (her father was co-founder of the chain). She also looks to her marital family (she's the widow of Frank Perdue from Perdue Farms) that began in 1920.

In both cases, family members in each generation put enormous effort into creating and maintaining strong, values-based cultures. Her talks stem from her lifelong observations not only of how her two families have kept together over a combined total of 224 years, but she's also closely observed how other high net worth families, often ones she's known since childhood, created and continuously strengthen positive cultures. She's also observed almost countless cases where families that lacked a supportive culture failed spectacularly.

Keynote Address: Timeless Secrets of Success: How to Inspire Loyalty, Engagement and Willingness to Go the Extra Mile

MONDAY, SEPTEMBER 24 | 1:20 PM - 2:30 PM

CAL TURNER JR.

Cal Turner, Jr. received his B.A., cum laude, from Vanderbilt University in 1962. Following his graduation from Vanderbilt, Mr. Turner served for more than three years as an officer in the United States Navy. In December 1965, he began his career at Dollar General, the company founded by his father and grandfather in 1939. He succeeded his father as president in 1977 and as chairman in 1988. At the time of his retirement in 2003, Dollar General had grown into a New York Stock Exchange retailer with more than 6,000 stores in 27 states and annual sales in excess of $6 billion.

Mr. Turner has served on the boards of a number of civic and charitable organizations, including the Easter Seal Society of Tennessee, Inc., Fisk University, the PENCIL Foundation and the YMCA of Middle Tennessee. From 2000 – 2001 he was president of the Board of Governors of the Nashville Area Chamber of Commerce. He has served as Chairman of the YMCA of Middle Tennessee and Lindsey Wilson College in Columbia, Kentucky and he is currently trustee emeritus of Vanderbilt University after serving on the Vanderbilt Board of Trust for 17 years.

Keynote Address: My Father's Business: The Small-Town Values That Built Dollar General Into a Billion-Dollar Company

TUESDAY, SEPTEMBER 25 | 8:30 AM - 9:30 AM

MARK PRATER

Mark Prater graduated from Portland State University in 1981 with a B.S. in accounting. He also obtained a J.D. from Willamette University in 1984 and an LL.M. in Taxation from the University of Florida in 1987. Mr. Prater became a member of the Oregon and Washington State bars in 1984 and a certified public accountant in Washington in 1986. He practiced with Touche Ross from 1984 to 1986 and a Portland law firm, Dunn, Carney et al. from 1987 to 1990. From January 1990 through November 1993, Mr. Prater served as a tax counsel on the Republican staff of the U.S. Senate Finance Committee. Since November 1993, Mr. Prater has served as Chief Tax Counsel on the Republican staff of the Senate Finance Committee and since January 2007, has also served as Deputy Staff Director of the Republican staff.

In September of 2011, Mr. Prater was selected as Staff Director for the Joint Select Committee on Deficit Reduction, ("JSCDR") i.e. the Super Committee.

Mark and his wife Lori live with their son James near Capitol Hill. When Mark isn't working, he enjoys watching the Washington Capitals.

Keynote Address: Opportunities and Challenges for Families of Wealth After the Tax Cut & Jobs Act

TUESDAY, SEPTEMBER 25 | 1:30 PM - 2:30 PM

DR. JOHN TOWNSEND

Dr. John Townsend is a New York Times bestselling author, business consultant, leadership coach and psychologist. He has written over 30 books, selling 10 million copies, including the Boundaries series and his newest book, Leading From Your Gut, to be released summer of 2018.

For more than twenty years Dr. Townsend has engaged with leaders, organizations and individuals around the globe, offering them life-changing solutions to their challenges. He and his organization provide team and executive coaching, corporate consulting, and give conference presentations. Dr. Townsend personally also coaches families and family businesses.

John has launched TownsendNOW.com, a digital content and experience base for those wanting to lead and grow. In addition, the Townsend Leadership Program, which develops leaders nationwide, is conducted by a team of Directors who have been personally trained by John. Dr. Townsend is also founder of the online Townsend Institute for Leadership and Counseling at Concordia University Irvine, offering graduate degrees and credentialing in Organizational Leadership, Executive Coaching and Counseling.

Keynote Address: The Four Habits of Healthy and High Performing Families

WEDNESDAY, SEPTEMBER 26 | 10:15 AM - 11:30 AM

PRE-CONFERENCE WORKSHOP SPEAKERS

TEDDIE USSERY

Teddie is the Founder and President of Family Office Matters, LLC, a unique firm that offers very personal and customized services to single and multi-client families. Teddie also offers consulting and advisory services to ultra high net worth wealth management groups and family office industry clients. Over the past 30 years, Teddie has worked to develop the Family Office concept integrating family dynamics and intergenerational issue of assets and inheritances.

Prior to founding Family Office Matters, LLC in 2006, Teddie served as Family Office Director and Senior Vice President of Synovus Financial where she built and managed their Family Asset Management Group before retiring from Synovus with 25 years of service. Teddie also served as Senior Managing Director for Education and Consulting for The Family Wealth Alliance, where she led the firm's family education and private consulting initiatives until 2012. Having a passion for family education, Teddie Co-Founded FamilyPath Consulting, LLC in 2018 which offers a comprehensive education program helping families preserve their values through the generations.

Teddie is a noted conference presenter and serves in collaboration with industry family office providers.

MELISSA MALLOY

Melissa Malloy is a co-founder and Managing Partner of FamilyPath Consulting, LLC, a consulting firm that specializes in preserving family legacies for multi-generations. FamilyPath is a comprehensive education program that focuses on growth and development of future family leaders to preserve their legacy. The firm's structured approach provides opportunities throughout the stages of life that reinforce family values and mission. They provide planning, education, experiences, coaching, accountability and reinforcement every step of the way.

In addition to being a Managing Partner of FamilyPath Consulting, Melissa also is the CEO/ President of Pathway Consulting. She brings over 20 years' experience in the global payments space. She consults with B2B companies and individuals specializing in Client Experience Management, Strategic Planning, Leadership Development & Executive Coaching, Process Improvement, and Employee Engagement. She works with all levels of leadership to deliver on their brand promise, make customers for life, and create highly engaged leaders and teams.

Melissa is a skilled facilitator and public speaker. She is a certified Coach, Speaker, and Trainer and part of the John Maxwell Team.

NANCY THORNTON

Nancy is a co-founder and Partner of FamilyPath Consulting, LLC, a consulting firm that specializes in preserving family legacies for multi-generations. FamilyPath focuses on development of future generations with a goal of preserving the values, vision and legacy of multi-generation families. They provide educational experiences combined with coaching.

Nancy combines over 25 years of experience in corporate learning and development with a passion to see families succeed in today's fast paced world. She serves as a coach, facilitator and content developer for FamilyPath Consulting. She is a certified Coach, Speaker and Trainer through the John Maxwell Team organization.

FAMILY OFFICE SESSION SPEAKERS

CASSIE ATTEBERRY

Cassie Atteberry is an HR Director at Hallmark Cards, Inc. who is dedicated to supporting the Chinquapin Family Trust as part of her client group. During her twenty-year human resources career she has specialized in helping clients achieve their business strategy by getting the right structures, processes, cultures, talent and talent processes in place. A significant portion of her time is spent coaching employees and managers on leadership, 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 from the College of St. Catherine in St. Paul, MN. She is known as high-energy, being a strategic partner, truth teller, trusted confidante, and not taking herself too seriously. She enjoys time with her family and dogs and visiting her native Montana as often as possible.

CHARLIE J. CARR, CFP

Charlie inspires families to achieve their legacy for the next 100 years.

He leads the firm's family enterprise advisory offerings, which includes solutions for families, their family business and family office. He leads projects in family and business governance, succession planning, setting up family offices, and performing diagnostic reviews of existing family offices to ensure they most effectively support the family and its desired legacy.

Charlie has worked in professional services for over 25 years, as a consultant, banker and wealth advisor. For the last 15 years, he has worked exclusively with very wealthy families, their businesses and their family offices.

He is a frequent speaker and contributor on family office and succession topics, including working with Family Business Magazine in 2016 to produce five videos discussing family business basics.

He holds a Bachelor of Business Administration in Accounting and Management from Baylor University and is a CERTIFIED FINANCIAL PLANNER™, with a Six Sigma green belt for process design.

Charlie coached youth baseball for 15 years and has developed and taught a personal finance class for high school students. He lives in Flower Mound, Texas, with his wife and 3 sons.

ROBERT H. CROSBY, III

Robert H. Crosby III is a 4th generation landowner and has been President of Crosby Land & Resources since 1997. After graduating from Louisiana State University in 1977, Robert joined the family business as a salesman for the manufacturing plants. As the company evolved from a manufacturing company to a timberland company, Robert's position within the company changed as well. By 1982, Robert was responsible for both the forest and mineral management of the company. The New Orleans-based company, which owns 135,000 acres in western Louisiana, is one of the nation's largest family-owned non-industrial timberland businesses.

Robert has served in many leadership roles in and out of the forestry including current President, Board of Director and Executive Committee of Forest Landowners Association, Board of Director and Past President of Louisiana Forestry Association, Chairman of the Board of Louisiana Forestry Foundation, Advisory Board to the Louisiana Forest Products Development Center and Board of Director, Past Chairman of the Board and 20 years served on the Board of Directors of LSU Foundation.

In 2013, Robert was named national Forest Landowner of the Year by Forest Landowners Association.

Robert and his wife, Kim, have 3 grown children and recently welcomed their first grandchild.

FAMILY OFFICE SESSION SPEAKERS

CHRISTINE K. GALLOWAY

Christine Galloway is the retired President & CEO of a large, established and highly professional family office, Okabena Company, serving the Dayton family. Her strategic leadership led to the development and execution of the company's long-range strategic plan resulting in the professionalization of operations; the infusion of risk management, transparency and accountability into every aspect of the investment management process; and the creation of a positive corporate culture resulting in an exceptional level of client and employee satisfaction.

Chris's strategic leadership capabilities led to Okabena Company's recognition as an industry thought leader in the design and delivery of customized solutions via a fully integrated platform of investment and financial services characterized by excellent investment performance and sophisticated long-range planning designed to grow and preserve wealth. Integral to Okabena's service delivery were communication processes and educational programs that have been adopted by peers across the family office industry.

Chris currently serves as director and/or trustee on various family office, private company and non-profit boards.

BONNIE GAUGER

Bonnie Gauger is Human Resources Director at Johnson Keland Management, Inc., the Racine, Wisconsin-based Family Office for the individual members of the Samuel C. Johnson and Karen Johnson Boyd families. In addition to 13 years of HR leadership experience in the Family Office industry, she has nearly 20 years of experience in the human resources field, including roles as Vice President of Human Resources and Learning and Development at BNY Clearing, a securities clearing subsidiary of the Bank of New York, and previously held HR and Corporate Training positions at Milwaukee-based Assurant Health. She is an active member of the local and national chapters of the Society of Human Resources Management. She is also a dedicated volunteer and advisory committee member for the Wisconsin Humane Society as well as Crossroads Career Network, a program that assists job seekers. Bonnie holds an MBA degree from the University of Wisconsin-Milwaukee as well as a Bachelor of Business Administration degree from the University of Wisconsin-Parkside.

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 tax, and estate planning.

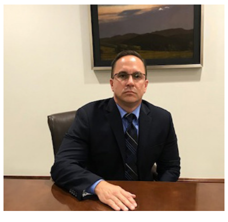
FAMILY OFFICE SESSION SPEAKERS

LAURA LIANG

Laura Liang is a Vice President of Operations and Accounting for the Dan L Duncan Family Office and the Chief Grants Officer for the Dan L Duncan Foundation both based in Houston, Texas. Laura has worked in this family office since its formal inception in 2000, and has worked with the family to grow help segregate the family office from the family operating business. Prior to becoming part of the family office, Laura held various roles in the family operating business including Contract Administrator, Distribution Analyst and Manager of Business Development. In 2015 Laura added the role of Chief Grants Officer with the Dan L Duncan Foundation as it begins active grant making in 2016.

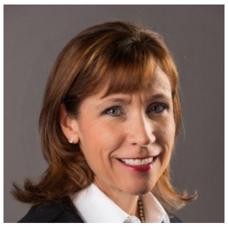
In addition to her duties in the Dan L Duncan Family Office, Laura serves on the board of the Private Investor Coalition, and the Advisory Committee for the Southeast Family Office Forum. Laura is a former Advisory Board member for Family Office Exchange.

Laura has taken an active role in her community by serving on the board of Heroes for Children, The Girl Scouts of San Jacinto Council, Lone Star Swim Team, and is a volunteer with her children's boy and girl scout troops, swim team, band, basketball and dance. Laura has an accounting degree from Western Illinois University and lives in Houston, Texas with her husband, four teenage children and their dog.



CHRIS LOHSE

In excess of twenty-five years of law enforcement and correctional experience with the Houston Police Department and Texas Department of Criminal Justice to include operations and experience at line, supervisory and management levels. Extensive experience in street level patrol, gang, tactical, narcotics and other crime reduction efforts. Command experience in homeland security, crisis management and civil disturbance operations. Multiyear (11) investigative, supervisory and managerial experience in fraud and financial crimes to include oversight of United States Secret Service and F.B.I. financial crimes task forces. Bachelor of Science in Law Enforcement and Police Science (Sam Houston State University) and Certified Fraud Examiner (CFE).



KRISTIN B. MARTIN

Kristin Martin is the Manager of the Love Family Office in Oklahoma City, OK. Tom and Judy Love founded Love's Travel Stops & Country Stores, Inc. in 1964. Since this time Love's has grown to more than 460 locations in 41 states with more than 22,000 employees.

The Love family is very much involved in the day to day operations of the Love's Family of Companies. Generations one through three serve as active employees in the business. The Love Family Office serves the three generations by offering accounting, cash flow management, estate planning, trust administration, foundation administration, real estate management, legal, risk management, governance, education, and tax planning services to the family.

Kristin joined Loves in 2008 serving in the income tax department. In 2011, the Love family decided to formalize the family office. Kristin left the tax department to help launch the Love Family Office and develop and expand the services offered to the Love family.

Prior to joining Loves, Kristin worked in public accounting for seven years. She has also served in different capacities in private industry.

Kristin is a member of the AICPA and the Oklahoma Society of CPAs. She is very active in her community volunteering in the Oklahoma City and Yukon public school systems as well as serving in many different volunteer roles over the years within her church.

FAMILY OFFICE SESSION SPEAKERS

MARIANN MIHAILIDIS

Mariann Mihailidis serves as managing director and consultant to family office members of the Family Office Exchange. In her role she oversees the management of all domestic family office relationships. As a practicing tax and estate-planning attorney, she develops strategies in wealth transfer issues, taxes, and corporate structures. Mariann has served as an executor and trustee, and her fiduciary responsibilities included administrative, legal, and accounting duties of various trusts and estates.

Prior to joining FOX in 1996, Mariann worked in one of America's leading family offices for four years as an accounting manager for the family's investment partnerships and operating companies.

She also spent more than six years in public accounting, including work as an auditor for Price Waterhouse. Mariann received a Bachelor's Degree in accounting from the University of Notre Dame and a JD from IIT-Kent College of Law.

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.

GREGORY T. ROGERS

Greg is recognized as one of the leading strategic thinkers and family dynamics facilitators with regard to the long-term well-being of Enterprising Families and sustainable relationships with their service providers. He is responsible for leading all aspects of RayLign including business management, business development and relationship management. Prior to founding RayLign in 2004, Greg was Executive Vice President & Chief Operating Officer at John A. Levin & Co., a publicly-traded asset management company that included a family office and over $13 billion in assets under management; Managing Director and builder of a strategic consulting practice called BARRA Strategic Consulting Group (that became Casey Quirk & Associates and sold to Deloitte in 2016); and Managing Director of his family business, RogersCasey, engaging in asset manager due diligence, asset allocation and investment program monitoring on behalf of Fortune 500 institutional investors (sold to BARRA Inc. in 1996). Business projects spanned the globe including the US, Asia, Europe, the Middle East, and South America. In addition to his current corporate responsibilities, Greg is Executive Committee Board Member at the Ackerman Institute for the Family; Greenwich Academy Board Trustee – Head of Diversity Committee and Member of the Investment Committee; Collaboration for Family Flourishing Member; TIGER21 Member; is guest speaker at Columbia University's Family Business Center and YPO, and has been IPI Wharton Private Wealth Management Program adjunct professor. Greg earned an MBA in International Finance from the New York University Stern School. He graduated from Brown University with a BA in Economics, Organizational Behavior and Management, with coursework in Psychology

STEVE SMITHERMAN

Steve Smitherman has over 16 years of family office experience. He is Vice President of The Family Office, LLC and The Family Private Trust, LLC and where he manages client family relationships, private trust company and family office operations. His areas of focus include financial reporting, technology, trust administration, client/beneficiary relationships, tax, and estate planning.

FAMILY OFFICE SESSION SPEAKERS

Steve is a Certified Public Accountant and earned BA degrees in Business and Marketing from Belmont University in Nashville, TN. He is a member of the Tennessee Society of CPAs and a founding member of Society of Leaders in Development (S.O.L.I.D). He also volunteers with several organizations, including CPA Dads, Abba's Way, and Father's Heart.

BELINDA SNEDDON

Belinda is a Managing Director with the firm's family enterprise advisory practice, which includes solutions for families, their family business and family office. She leads projects in family and business governance, succession planning, establishing family offices, and performing diagnostic reviews of existing family offices to ensure they most effectively support the family and its' desired legacy.

Belinda has over 25 years of experience as a consultant, multi-family office executive, and investment professional. For the last 15 years, she has focused exclusively on advising and supporting wealthy families on issues of wealth transfer, governance, succession, investment policy and philanthropic initiatives as the Group Executive and National Practice Executive for U.S. Trust's family office. She has significant experience in the management of family office functions including; fiduciary administration, investment oversight, operations and financial metrics. Belinda is a frequent national speaker on a wide range of family office and impact investing topics.

She holds a Bachelor of Business Administration in Finance and Marketing from the University at Albany – SUNY.

Belinda is an amateur musician and has a passion for arts education. She lives in Pelham, NY with her husband and two children.

LESLIE C. VOTH

Leslie C. Voth is President and Chief Executive Officer of Pitcairn, a recognized global leader in the specialized multi-family office marketplace. Leslie's industry experience and invaluable insights have contributed to the success of both the firm and its clients. She has been a member of Pitcairn's senior management team since 1996. She has served in several leadership roles including Director of Marketing from 1996-2001, President of the Wealth Management Group from 2002-2008, and President and Chief Operating Officer from 2008 until assuming her current responsibilities.

Leslie is directly responsible for overall corporate planning and strategic growth, and oversees all client relationships. She has played a key role in Pitcairn's growth and expansion, spearheading development and implementation of an industry-leading 100% open architecture investment platform, and developing a total wealth management strategy utilized by the firm's clients. She has pioneered the creation of multi-disciplinary teams to collaboratively meet the increasingly complex needs of the firm's clients.

Leslie was named "Family Office Leader of the Year" at the Family Office Review Awards 2015 for her dedication as a leader and for her contributions to the family office industry. She was also awarded the top honor of "Women in Wealth Management" at the Family Wealth Report Awards 2014 for her individual contributions to the wealth management industry. Leslie is regularly quoted in industry publications including Barron's, The Wall Street Journal, The International Family Offices Journal, Private Wealth, and Family Wealth Report.

In addition, Leslie is a member the Wigmore Association, a global collaboration of chief executive officers and chief investment officers from eight family offices from across North America, Europe, Australia, and South America. The group, which launched in 2011, exchanges views, research, and insight to enable members to enhance their global perspectives and enrich their business models and investment processes.

Leslie joined Pitcairn in 1993, serving as Director of Marketing and Communications. In that capacity, she founded the Pitcairn Women's Forum, the firm's pioneering and much-praised educational program targeted to women.

A veteran of the financial industry with over two decades of accomplishment, Leslie also served for nine years as Vice President of the Meritor Financial Group before joining Pitcairn.

She holds a degree from Wheaton College and, outside of her professional duties, is involved with many groups that support the arts and is an avid gardener.

FAMILY BUSINESS SESSION SPEAKERS

ROY JONES

As Executive Director of the Cathy Family Office, Roy's primary responsibilities include overseeing the family office team, advising Cathy Family members on investing and giving options and helping mentor Gen 3. Roy also serves as a family and company ambassador in a variety of initiatives inside and outside Chick-fil-A.

Roy has served as Managing Director of three private equity funds and on the Boards of multiple private companies and non-profit entities. He currently serves as a trustee of the Eagle Ranch Foundation.

From November 1998 through January 2004 Roy was responsible for the Family Office of Henry F. "Hank" McCamish, where he served as the Chief Investment Officer, Chief Operating Officer and General Counsel of the McCamish Group, L.P., in Atlanta, GA. He also served as the President of McCamish Foundation. The focus was on entrepreneurial investing with all gains being given to Christian, educational and humanitarian causes. Hank empowered Roy to serve on many early stage ministry boards to help secure the best business practices were brought to the ministry field to help aid their long-term success, with God's blessing, of course.

Roy practiced law for 14 years in a law firm that he co-founded. His practice was focused on commercial real estate transactions and development, private equity, estate planning, deal structure and finance of complex transactions. For the last several years of his legal career, Roy functioned as primary advisor to several extraordinary families and gained intimate exposure to the inner workings of private companies, successful families, investment strategies and intergenerational planning.

Roy is a Phi Beta Kappa graduate of Washington and Lee University. After several years in business where he led a successful start-up, Roy graduated from Emory University School of Law, with distinction, was awarded Order of the Coif honors and was on the Law Review. In 2000, Roy was admitted to practice before The Supreme Court of the United States of America.

A native Atlantan, Roy married his best friend and college sweetheart, Carter, 41 years ago. They have two grown sons and worship at The Church of the Apostles. Roy leads a weekly mentoring group/bible study with millennial men and also enjoys hiking, shotguns, and cooking on his Big Green Egg.

MARION MCCOLLOM HAMPTON, Ph.D.

Dr. Marion McCollom Hampton is a co-founder and Senior Partner at BanyanGlobal. She has been active in the family business field for 25 years, and has been named a Fellow in the Family Firm Institute. She is co-author of a foundational work in the family business field, Generation to Generation: Life Cycles of the Family Business (with Kelin Gersick, John Davis, and Ivan Lansberg, Harvard Business School Press, 1997).

Marion's family business advisory practice focuses on helping families address relationship and governance issues to achieve business continuity from generation to generation. She has served clients and run educational programs for families in business in Latin America, Europe, and the Middle East, as well as in the United States.

Marion was on the Organizational Behavior faculty of Boston University's School of Management from 1986 to 1997. She has published a number of articles on the structure and dynamics of family owned business, in addition to cases, scholarly articles on organizational culture, and two books dealing with organizational issues. She has also taught in university executive leadership programs at Dartmouth's Tuck School and the Wharton School, as well as in private corporate programs for Carrier, General Electric, Caterpillar, Grant Thornton LLP, and JP Morgan Chase Private Bank.

She received an AB magna cum laude from Harvard University, an MPPM (masters of management) from the Yale School of Management, and a Ph.D. in organizational behavior, with Distinction, from Yale University. She is a member of the Kaw/Kanza tribe of Oklahoma and lives with her daughter in Belmont, Massachusetts.

FAMILY BUSINESS SESSION SPEAKERS

ALEXANDRE MONNIER

Alexandre Monnier is President of Family Office Exchange (FOX), a global organization that helps wealthy families and their advisors master the unique challenges inherent to wealth ownership. FOX's support includes networking opportunities, knowledge, advice and education on key topics such as managing wealth, family governance, legacy, succession and best practices for running family offices.

Alexandre oversees FOX globally and has extensive experience in creating, marketing, and delivering premium services to families of wealth in the wealth management, private aviation and healthcare industries—both in the US and internationally.

He joined FOX from PinnacleCare, a leader in private health advisory services, where he led the development of the business in the U.S. and in Europe. Earlier Alexandre ran Skyjet, Bombardier Aerospace's private jet charter business, transforming the business from an emerging player to a leading private jet travel provider.

Previously, Alexandre spent 10 years as a management consultant serving some of the most widely recognized firms in the U.S. and Europe on issues ranging from strategy to operational and organizational effectiveness. He started his career in finance with Societe Generale.

Alexandre is a graduate of ESCP Europe, one of Europe's leading business schools. He has been a member of Young Presidents' Organization since 2005.

RICKY B. NOVAK

Mr. Novak specializes in niche areas of tax planning and works directly with high net worth investors, family offices and their trusted advisors. His expertise focuses on tax-deferred 1031 exchanges, tax-deferred Opportunity Zone funds, and conservation easements including numerous federal and state sponsored tax credit/deduction strategies. His prior work and board experience includes the International Taxation practice, Arthur Andersen; the Real Estate Taxation practice, Deloitte; Board of Directors, Atlanta Bar Association; Chair, Atlanta Bar's Real Estate Section. He is the Past President of the Real Estate Group of Atlanta.

FAMILY CONNECTION SESSION SPEAKERS

CYNTHIA MOE

- Certified Trainer, The Center for Nonviolent Communication
- Adjunct Professor, Masters of Education Program, Thomas University, 2016-2018
- Recognized Facilitator, The Georgia Network for Nonviolent Communication
- MFA (Art) University of Georgia,
- BS (Bus Ed) University of Florida

Skills derived during earlier life while focused on raising two boys, teaching high school, college and private school, community outreach, and business consulting are now blending to enrich my specialization on relationship enhancement — personal and professional. Having both witnessed and experienced the transformation that can occur through intentional focus on all needs being valued and heard, I am committed to facilitating this possibility wherever possible.

I also love introducing organizations to the meeting and decision-making ease, dynamic effectiveness, and sustainable conflict management made possible by utilizing the Consent Circle, Nonviolent CommunicationSM, and Restorative Circle models.

LEROY H. PARIS II (LEE)

Lee serves as Managing Partner of Meadowbrook Capital and is currently serving in Business Development for Wellspring Associates in Atlanta. He has also been Director of Planters Bank and Trust Company and the Mississippi Business Finance Corporation.

He is a graduate of The University of Mississippi and The University of Mississippi School of Law. He is a member of the Mississippi Bar Association.

Lee serves as Deacon of the First Presbyterian Church of Jackson. He is Chairman of the Board for National Center for Fathering and The Mississippi Charitable Foundation. He is a former Director of the Children's Scholarship Fund of Jackson and has served as a Director of The University of Mississippi Alumni Association. He has served as Chairman of Mission Mississippi and as a Director of the Rotary Club of Jackson, The University of Mississippi Foundation and Patrick Morley Ministries and as President of The River Hills Club. He has served as state chairman of the Young Presidents' Organization (YPO), Chairman of YPO's Christian Fellowship Network and also served on the Board of the WPO Rebel Chapter as its Network Coordinator.

Lee resides in Jackson with his wife, Lisa. They have three children and four grandchildren.

ANDREA SCHARA, LICSW

Ms. Schara is a Family Systems Coach with 38 years of experience. She specializes in coaching people to have more fun and be more creative as they seek to define a self in their family and social systems. Neurofeedback (zengar.com) is a tool she uses to enable greater integration of the mind/body as people begin to alter old patterns in the relationships system.

Her second book, Your Mindful Compass: Breakthrough Strategies For Navigating Life/Work Relationships In Any Social Jungle, was published in 2013 and is available on Amazon.com

Currently, she sees individuals and families in Darien, Ct. and in Washington, DC. In addition, she offers family weekend retreats at the Zen Farm in Fredericksburg, Va.

Ms. Schara is also available for meetings and small group learning experiences and currently is teaching in the Navigating Systems program.

See more on her web site www.ideastoaction.wordpress.com

FAMILY CONNECTION SESSION SPEAKERS

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 has found her passion facilitating and acting as a change agent, helping nonprofits, individuals and multigenerational families explore next generation engagement in their philanthropy and family enterprises.

Jillian is a highly respected speaker, both nationally and internationally, on topics such as 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 with engaging the next generation. 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 taught fifth grade for three years in an Atlanta elementary school after earning a BA in Elementary Education at Michigan State University.

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

NEXT GEN SESSION SPEAKERS

BEVERLY BROOKS THOMPSON, Ph.D., CFRE

Beverly Brooks Thompson is a published academic and practitioner in the field of philanthropic leadership. She holds a Doctorate in Human Resource Development specializing in Organizational Leadership with more than 20 years of fundraising campaign experience. Beverly is the founder of Brooks Thompson Consulting, Brooks Thompson Consulting, an international fundraising advising and philanthropic management consulting firm specializing in transformational growth, impact giving, and strategic social engagement serving non-profits, organizations and corporations, and individual philanthropists. The Brooks Thompson team combines proven advancement principles and fundraising best practices with innovative, custom-tailored strategies to assist clients in realizing their philanthropic goals.

Programs under her direction have received national awards and recognition at CASE, APAP and NASPA, as well as awards from the Advertising Federation and numerous Public Relations organizations. Thompson has been licensed as a Certified Fundraising Executive (CFRE), is a Certified Advisor in 21/64 Next Generation Family Wealth and is a Master Trainer for the Association of Fundraising Professionals. She is an active member of the Association of Fundraising Professionals, Omicron Delta Kappa Honor Society and, has been conferred an official State of Kentucky Colonel. She was recognized by the Baton Rouge Business Report in the 2008 class of Top Forty under 40 and 2018 class of Most Influential Women in Business, has been recognized as the Marketer of the Year by Sales and Marketing Association, and was named the 2017 Alumna of the Year by Louisiana State University College of Human Science and Education.

Thompson gained national attention as the Director for Forever LSU: The Campaign for Louisiana State University, supporting the three adjoining campuses of LSU. Raising more than $798 million exceeding the $750 million goal, the Forever LSU campaign has stood out as a paradigm for success in higher education campaigns nationwide.

This led to her joining one of the most prestigious consulting firms of its type in the country. As vice president and executive counsel for two years, Thompson was senior counsel to leadership of the most prestigious non-profit organizations and boards in the country with responsibility for campaign development, implementation and management for programs that exceed goals of $500 million. Beverly's clients included such prestigious organizations as The Pratt Institute in Brooklyn, NY, Arizona State University Sun Devil Athletics, The Carnegie Science Center, UPMC Magee-Womens Research Institute, and Sigma Nu National Fraternity.

Thompson served as the President and Chief Development Officer at the Foundation for Woman's in Baton Rouge, Louisiana. In this role, Beverly established Woman's first supporting 501 (c) 3 foundation, seated and managed the Board of Trustees and all strategic and fiscal management of the foundation, including a $4.2 million endowment and served as a member of the executive leadership team of Woman's Hospital.

Beverly also serves on the boards of the LSU College of Humanities and Social Sciences, Junior League of Baton Rouge and the Kid's Orchestra. With long-term relationships with her clients, former employers, colleagues and communities, Beverly seeks to engage and sustain each effort with which she develops a relationship.

GREG McCANN

Greg McCann is the founder, principal and leader of a national family business consulting firm that create workshops, consults, publishes, and generally innovates on issues of importance to family enterprises.

As an author, educator, coach, consultant and speaker, McCann works with family enterprises in the areas of leadership, succession, communication, conflict resolution, and with a special emphasis on helping the rising generation succeed in their careers and lives. Greg has coached leaders and executives for nearly 20 years and is certified in Leadership Agility and Myers-Briggs Type Indicator.

McCann wrote, When Your Parents Sign the Paychecks and Who Do You Think You Are? Aligning your Character and Reputation.

NEXT GEN SESSION SPEAKERS

JENNIFER MUNTZ

Jennifer Muntz is the Executive Director at Family Business Network - North America and the Founder of FamilyCLO.

She began her career in the non-profit world helping re-unify families after abuse or neglectful situations and teaching people with mental illness job skills and socialization skills. Her career transitioned into the world of managing corporate training and organizational development. Jennifer's enthusiasm and passion for teaching and developing individuals, families, teams and organizations is demonstrated by 15 years of experience working in the field across different industries.

While at Family Office Exchange (FOX) she developed and facilitated virtual and in-person education programs, authored the "FOX Guide to Family Education", co-led the NextGen Network and consulted with families and family offices on education and training.

Jennifer is the Principal and Founder of FamilyCLO, a private firm that provides education and training programs and services to enterprising families, family offices and other education providers in the family business, family office arena.

She holds a B.S. in Psychology, an MBA and has been an active member of the Association of Training and Development (ASTD) since 2007.

JANET RIES STERN

Janet Ries Stern, Senior Associate, maintains a coaching and consultancy practice with executives in the nonprofit sector (www.visionarieslogic.com). She is trained and certified by the 21/64 Foundation to facilitate conversations, governance, and plans for multi-generational philanthropy and family wealth. Janet is certified as an Associate Certified Coach by the International Coach Federation, having trained in the Certified Coach Training Program of Teleos Leadership Institute. As a member of the board of the Inglis Foundation, she founded the Awards for Continuing Excellence (ACE). She serves on the boards of WXPN and KYLDance Company. Janet has developed curriculum, taught, and held administrative positions at Germantown Friends and the Agnes Irwin School in Philadelphia and Rosemont, PA. She has extensive experience with environmental advocacy and secondary education. She holds an undergraduate degree from the University of Pennsylvania and a law degree from the University of North Carolina.

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ASSOCIATION HOSTS

ATLANTA JEWISH FOUNDATION
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