



CELEBRATING ENTERPRISING FAMILIES AND THEIR RESILIENCE

SEPTEMBER 27-29, 2021
10TH 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.



BRIAN D. HUGHES

CO-FOUNDER TOUCHPOINT GROWTH STRATEGIES

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 in 2010. He has been part of the leadership of the Forum since 2012 and the Chair of the Executive Committee 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. Through their work with advisory firms, and advisors to family offices, Touchpoint Growth 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. Brian reconnected with long-time friend Gregory Roll to form Touchpoint Growth in 2016. Prior to the launch of HGS 2012, Brian was responsible for building and cultivating family and private foundation relationships at two privately held multi-family 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, impact investing and wealth management programs around the country, including the Wealth & Giving Forum, Impact Capitalism, RayLign's Family Frontiers, the Family Wealth Alliance, 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 two children reside in a Northwest suburb of Philadelphia.

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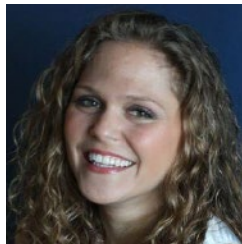


BRIAN FRIEDMAN
WELLSPRING ASSOCIATES

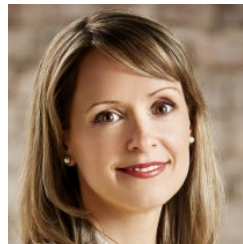
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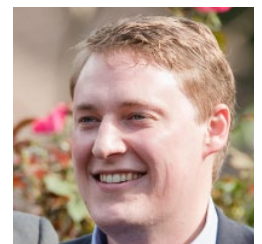
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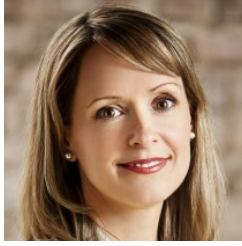


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**MARIANN
MIHAILIDIS**
M2 CONNECTIONS



ANNE JONES
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TOM ROGERSON
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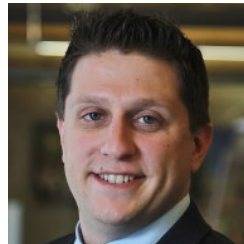


DAN BOWMAN
TIBBETTS HOLDINGS

TECH SUB-COMMITTEE



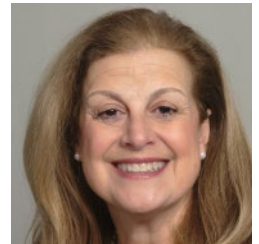
RYAN TREMMEL
WELLSPRING
ASSOCIATES



GRAHAM PECK
COATTAILS, LLC.



BRIAN HUGHES
TOUCHPOINT GROWTH
STRATEGIES



**NICKI COLOSI
TRILLING**
INSURANCE
CONSULTANTS

9/27

MONDAY

7:30 AM – 8:00 AM	Pre-conference Registration
8:00 AM – 11:00 AM	Pre-conference Workshop <i>Mastering Your Family Meetings To Achieve Your Strategic Goals</i>
11:00 AM	Forum Registration Opens
11:00 AM – 11:30 AM	SEFOF Leadership Committee Meeting
11:30 AM – 1:00 PM	Lunch
12:30 PM – 12:50 PM	Newcomer Orientation
1:00 PM – 2:30 PM	Opening Keynote Address <i>Mastering Transitions—Tools and Takeaways for Navigating Uncertain Times</i> Bruce Feiler
2:30 PM – 3:00 PM	Break
3:00 PM – 4:30 PM	Concurrent Breakouts FAMILY OFFICE <i>Family Office 101</i> <i>Managing through and Beyond a Global Pandemic</i> FAMILY CONNECTION AND LEGACY <i>How to Define Success for Your Family Enterprise</i> FAMILY BUSINESS <i>Passing the Baton—Preparing Next-Generation Family Leaders for Success</i> NEXT GEN <i>How to Create the Ability to Reach Unity in Diversity</i>
4:45 PM – 5:45 PM	Keynote Address <i>Beyond Business</i> Lonnie Gienger
6:00 PM – 7:00 PM	Networking Cocktail Reception
7:00 PM – 9:00 PM	Dinner <i>Celebrating Resilient Families</i>
9:30 PM – 12:00 AM	Next Gen Social

MONDAY SESSIONS

Opening Keynote Address

Mastering Transitions—Tools and Takeaways for Navigating Uncertain Times

Bruce Feiler

Drawing on the groundbreaking revelations in his new book *LIFE IS IN THE TRANSITIONS*, Bruce Feiler presents a timely new roadmap for how families of significant wealth can transform and reinvent themselves in times of transition to live with more meaning, balance, and joy. Bruce spent the last seven years collecting life stories of Americans who underwent enormous life changes, then analyzing those stories for patterns and takeaways that are remarkably prescient for the moment we all face today. Mining this rich wellspring of data and stories, he uncovers the greatest emotions we struggle in times of change, the biggest roadblocks to reinventions, the habits we most need to shed, the secrets to being creative in moments of uncertainty. With extraordinary insight and urgency, Bruce introduces a groundbreaking toolkit for flourishing in periods of upheaval and the first new model for navigating life transitions in half a century.

Family Office

Managing through and beyond a Global Pandemic—How to Build and Sustain a Resilient family office during a time of stress and constant change

Moderator: Laura Liang, Duncan Family Office, Senior Vice President

Panelists: Jodi Ganz, Belfer Management, Chief Operating Officer and General Counsel; Betty Dykstra, Nahwatzel, President and Chief Executive Officer; Cathy Wereda, The Hurvis Group, Chief Executive Officer; Christine Franco, Chinquapin Trust Company, Chief Executive Officer

Many of us can point to a date sometime between mid-February and mid-March, 2020, when we had to really re-think how our offices were going to function. The entire office was going remote, business travel was stopping, and popping into the neighboring office or sitting around the conference table was no longer happening. Management, staff and family members were dealing with personal health concerns, and a spring break that did not end for over 5 months.

This panel, with representatives from both imbedded and stand-alone family offices, as well as, different areas of the country will share their biggest challenges and most creative solutions. We will talk about what we have learned, changes we may hang on to, and what a post COVID family office might look like.

Family Connection & Legacy

How to Define Success for Your Family Enterprise

Josh Baron

One of the wonderful parts about being part of a family enterprise is that you get to choose how you define success. For most families, being in business together is about much more than making money. But unless you are clear about what you want—and don't want—from your family enterprise, you are missing out on the opportunity to chart your own course. This breakout session will give you a chance to do just that. We will introduce an approach for defining what you value as a family enterprise that starts with understanding your purpose for being in business together and then translates that purpose into specific goals and guardrails for your enterprise. In a workshop-format, you will have the opportunity to share your insights with each other and leave with some practical tools for getting the right conversations started.

Facilitator: Dr. Josh Baron is a co-founder and Partner at Banyan Global. For the last decade, he has worked closely with families who own assets together, such as operating companies, family foundations, and family offices. He focuses on how ownership creates a competitive advantage, how families can escape major conflicts, and how philanthropy can help families achieve their broader goals. He is also a co-author of the HBR Family Business Handbook. This new book brings sophisticated guidance and practical advice from Family Business experts who present proven methods and approaches for communicating effectively, managing conflict, building the right governance structures and working together for good.

Family Business

Passing the Baton: Preparing Next-Generation Family Leaders for Success

Moderator: Stephen P. Miller, Ph.D.

Panelists: Ted Wentz, Jr, G1 Founder and Ted Wentz, III, G2, CEO, Quadratic, West Chester, PA

Succession is typically at the top of the list of concerns for business owning families.

The thought of passing the leadership baton from one generation to the next, choosing the next leader from among family or non-family members, transferring ownership and preparing an estate plan is enough to stop the most decisive leaders in their tracks. Highly successful leaders often put off succession discussions, but if they want their businesses to thrive through one or more generations of family ownership, they must engage in succession planning.

This session draws upon [Miller's research](#) which focuses on factors that influence the development of next-generation leaders. This session will share practical ways participants can apply the findings to support successful transition from one generation to the next. Dr. Miller's research provides specific guidance for both next generation and incumbent leaders.

Participants will receive *Creating Your Family Business Succession Roadmap*, a white paper that outlines steps for increasing the likelihood of a successful transition.

MONDAY SESSIONS

Next Gen

How to Create the Ability To Reach Unity In Diversity

Moderator: Jillian Wagenheim

People can differ in so many ways. A famous proverb cites “a lot of different flowers make a bouquet.” It is unequivocal that diversity of voices and opinions create richer conversations, decisions, and results and often requires more time and coordination. Promoting *multiculturalism* within the same family so that different beliefs and perspectives can be appreciated and leveraged is a formidable resource for families to face even the most challenging situation. In this session, we will explore different kinds of diversity within the same family, beyond the more known, such as gender, race, and religion, to unveil the more covered and therefore not celebrated. We will explore some incredible contributions different individuals can bring to the table and how it is possible to find the right balance between various perspectives, including how the Now-Gen and the rising one can more deeply appreciate and celebrate one another.

Family Office

Family Office 101

Moderator: Ryan Haning, Cathy Family Office

Panelists: MFO: Scott Calhoun

Family office embedded in business—Kristin Martin, Love family office

Family office separate from business—Ilitch family office - Karl Anderson

Join us for an interactive session with a panel of family office executives from both single and multi-family offices. The discussion will be around primary questions concerning what a family office is, the difference between a single and multi-family office, as well as answering fundamental questions around family office structure, governance, services, staffing, funding mechanisms, building a robust and resilient team, and much more. Family Office 101 provides a unique forum for engaging conversation between attendees and our panel of seasoned family office executives.

Keynote Address

Beyond Business

Lonnie Gienger

“Legacy includes more than the amount of wealth we create for future generations. It also includes the amount of world changing good we create in future generations. Legacy doesn’t just depend on the quantity of portfolios and resources we build for future generation. It also depends on the quality of principles and relationships we build into the future generations. Family legacy includes all that your family holds dear and wants to preserve in future generations.

Great legacies or no accident. A great legacy requires a clear direction and persistent steps taken in that direction. Following this proven process for creating family legacy will result in a more harmonious family with a greater sense of shared identity and purpose.”

9/28**TUESDAY**

7:00 AM – 7:45 AM	Morning Run/Walk
7:30 AM – 8:30 AM	Breakfast
8:30 AM – 9:30 AM	Plenary Panel <i>The Often-Invisible Role of Women as Change Leaders—2021 Pitcairn Gen 7 Project Study</i>
9:30 AM – 10:00 AM	Break
10:00 AM – 11:30 AM	Morning Concurrent Breakouts FAMILY CONNECTION AND LEGACY <i>The Next Generation of Women as Integral Change Leaders Creating Multi-Generational Legacy</i> FAMILY OFFICE <i>Building Effective and Resilient Teams to Maximize Value to the Family</i> FAMILY BUSINESS <i>Three Generations of Change at Worth Industries</i> NEXT GEN <i>My Kid is Engaged—Why, When, Where, and How to Engage their Partner</i>
12:00 PM – 1:30 PM	Lunch
12:00 PM – 1:30 PM	Optional Lunch Breakout <i>Faith and Family</i>
1:30 PM – 3:00 PM	Afternoon Concurrent Breakouts FAMILY OFFICE <i>Enterprise Risk Management</i> FAMILY CONNECTION AND LEGACY <i>How Enterprising Families can Survive and Thrive for Generations</i> FAMILY BUSINESS <i>Connecting Governance, Engagement, and Family Vision</i> NEXT GEN <i>The Continuous Learning Journey to Build Owners' Capacity from 0 to 100 Years Old</i>
3:00 PM – 5:00 PM	Open Networking Break
3:30 PM - 4:30 PM	Bonus Breakout <i>2020 Family Office Benchmarking Report: Peer Perspective from Global Family Office Client Community-Northern Trust</i>
5:00 PM - 6:00 PM	Cocktail Reception—Gamification and Prizes
6:00 PM - 8:00 PM	Partner Dinners

TUESDAY SESSIONS

Plenary Panel

The Often-Invisible Role of Women as Change Leaders—2021 Pitcairn Gen 7 Project Study

Presenter: Amy Hart Clyne, Wendy Griffin Rogers, Martha Grover

Becoming a woman leader in a family enterprise is difficult, often underappreciated and usually hidden. Amy and two participants in her just released ground breaking research, will share themes and stories from 40 women who became leaders in founding and successor generations and how they handled the pressure of taking these roles amid cultural flux and gender role evolution. They will illuminate lessons learned on their role complexity, both formal/informal, and within the business and family. Participants will hear about the many ways that women exercise influence in the family and learn pathways to support, mentor and develop women's voice.

Family Office

Building Effective and Resilient Teams to Maximize Value to the Family

Speakers: Christine Franco, CEO, Chiquapin Trust Co. and Cassie Atteberry, Principal at Talent Outside the Lines

The biggest assets of any family office are its people, so high functioning and resilient teams are critical to delivering maximum value to your family. Hear from a family office executive and her former HR director about how to build a team and lead it through the ups and downs that all teams inevitably face. They will discuss hiring for more than just technical skills and understanding and building on the strengths and styles of your team, as well as share tools that help teams form, storm, norm and perform. Actionable take-aways will include tools, team-building exercises and additional resources.

Family Connection & Legacy

Creating Multi-Generational Legacy

Lonnie Geigner

Why do some families create wealth but little harmony and world-changing vision? Why is it that the next generation may inherit the wealth but not the harmony, principles or vision?

Legacy includes more than the amount of wealth we create for future generations. It also includes the amount of world changing good we create in future generations. Legacy does not just depend on the quantity of portfolios and resources we build for future generations. It also depends on the quality of principles and relationships we build into future generations.

This interactive workshop will provide principles, processes and real-life examples to help you create a more harmonious world-changing legacy.

You will walk away from this workshop with specific strategies to move your family toward greater harmony and vision in creating your own multigenerational legacy.

Family Business

Three Generations of Change at Worth Industries: Building Resilience through Evolution

Moderator: Cooper Biersach

David M. Worth (G2), David A. Worth (G3) and Jon Worth (G3) from Worth Industries, Greensboro, NC.

In this panel discussion you will learn from second and third generation family members about how they met the challenges of the future while respecting legacy and history even when it meant tough decisions regarding which businesses to keep, sell, shutter, or acquire.

To provide for succession for G2 and create an opportunity for G3 the family shed legacy businesses and repositioned remaining family assets to take advantage of new market opportunities. You will see how learning from change experiences can prepare a family to capitalize on opportunities in the future, and the role the next generation of leaders play in the ongoing renewal of the family enterprise.

For the Worth family, the choices were sometimes painful but have allowed G3 to build upon core competencies to make some risky strategic bets that are paying off now. Their growth accelerated during COVID and resulted in an alliance with another family firm. We will discuss how they have navigated these changes and some of their takeaways from how COVID affected their family business system.

Next Gen

My Kid is Engaged: Why, When, Where, and How to Engage their Partner

Gaia Marchisio, Ph.D. moderating; Cody Dubuc; Austin McDonald and Graham Peck

Marrying into a family enterprise is different. Rarely do the proper conversations occur early enough to allow spouses to express their contribution at best. Creating appropriate inclusion at the right time, in the right way, is crucial, and families aren't always prepared or assisted in doing so. As a result, the exchanges are reduced to legal documents, and the risk is that the high values that spouses bring to the table are missed or unappreciated. In this next-gen panel, different family members represent different stages, from dating to engaging and marrying. This session will help the audience navigate the various challenges and opportunities that are crucial to consider. By the end, the panelists will share a few strategies to recognize and value the role and significance that spouses add to both families and their enterprises.

Family Connection & Legacy

The Next Generation of Women Change Leaders—A Discussion

Moderator: Amy Hart Clyne

As a follow on to the keynote, this break-out will provide the opportunity for discussion about how the younger generation of women are navigating their leadership journey. Amy and two young women leaders will lead discussion on their obstacles, their strategies for growth as young leaders, and how leaders in their life have served well as role models.

TUESDAY SESSIONS

Faith & Family Session

Leroy H. Paris II (Lee) and Lee Habeeb

Family Office

Enterprise Risk Management—A Primary Key for Surviving 2020 and Creating a Resilient Family Enterprise

Moderator: Dan Bowman, Tibbetts Family Holdings, Tibbetts Family

Panelists: Dan Bowman, CEO, Tibbetts Family Holdings, Tibbetts Family; Jim Kane, SVP Personal Risk—Practice Leader; Wade Etheredge, Longworth/White family office

Family Office Executives must manage risks at a Family Enterprise level. This includes personal, business, cyber, financial, legal, and insurance risks. Most often this is seen as a tradeoff between an expense or an investment. We help each attendee develop a risk management matrix customized and prioritized to their family using benchmarks in the Family Office industry to help evaluate where there may be holes in your matrix. We will share and discuss measurement tools used to audit and identify your family's ability to mitigate risk.

Family Connection & Legacy

How enterprising families can survive and thrive for generations: The role of family entrepreneurship

Matt Allen

Babson College has been recognized as the world leader in entrepreneurship education for over 25 years. Join Professor Matt Allen as he talks about new research that he is conducting looking at the role of the family in the entrepreneurial process. Participants will hear real case examples from families that are getting it right . . . and wrong. In this interactive session, participants will also have the opportunity to practice new approaches to learning that can transform the family's entrepreneurial capability. All participants will leave this session with new tools that can be immediately applied in their own families.

Family Business

Connecting Governance, Engagement, and Family Vision: The Evolution of the Board and Governance of E. Ritter and Company

Moderators: Amelia Renkert-Thomas and Gardner Peck

Panelists: Dan Hatzenbuehler, retired Chair and CEO of E. Ritter and Company; Erik Kesting, Family Chair of Board of E. Ritter and Company; Katy Wilder Schaaf, Director and Former Family Council Chair, E. Ritter and Company; Jack Wilder, Director, E. Ritter and Company

Family businesses often find themselves at a crossroads as the business and the family grow: how do we strengthen our business governance and decision-making while creating pathways for family participation? Under the leadership of Dan Hatzenbuehler, G4 "outlaw" CEO and Chairman, and through purposeful engagement of the family, E. Ritter enhanced its governance, bolstered its board,

built out a Family Council to cultivate its next-gen human capital, and undertook a joint Family/Company divestment/reinvestment plan to reinvigorate its legacy businesses.

Dan, along with Katy, Jack and Erik—G5 family directors of E. Ritter and Company—will discuss how the family, owners, and the board came together to reconfigure the business holdings and governance of E. Ritter to meet the changing vision of its ownership group and to respond to the shifting focus, experiences, and expertise of the rising generation.

Dan, along with Katy, Jack and Eric—G5 family directors of E. Ritter and Company—will discuss how the family, owners, and the board came together to reconfigure the business holdings and governance of E. Ritter to meet the changing vision of its ownership group. Facing family concern about the future of one of its businesses and the shifting focus, experiences, and expertise of the rising generation, the board recognized the need to realign its purpose, vision, and business holdings with the family's interests. Ultimately, the board agreed to divest several businesses to create a fund for investment in new ventures.

Next Gen

The Continuous Learning Journey to Build Owners' Capacity from 0 to 100 Years Old

Wendy Sage-Hayward and Monica Walter, RFA Management Company, Caren Jones

The world of a family enterprise is complex and challenging. Families struggle with communication, disparate interests, and managing family dynamics on top of operating a demanding enterprise—all the while traversing the wealth landscape. This is not an easy feat, even for the highly skilled.

Where and when do families learn about the necessary secret sauce to masterfully balance these seemingly impossible tasks simultaneously? Raising a family is challenging enough without layering on growing a business's burden and responsibility while managing major external stressors. Becoming intentional and formal, without losing spontaneity, in developing next-generation and becoming a learning family is a crucial strategy to build resilience.

This workshop is a resource that can inspire enterprising families to learn and develop thoughtful, capable ownership by investing in and nurturing an owners' mindset before a crisis happens.

The facilitator will offer a learning structure and approach for each stage of an owner's development across the lifespan (from earliest years to retirement), considering the family's lifecycle stages, and individual level of maturity, talents, gifts that each family member brings to the table.

9/29

WEDNESDAY

6:30 AM – 7:15 AM	Morning Run/Walk
7:15 AM – 7:45 AM	Breakfast
7:45 AM – 8:45 AM	Morning Keynote <i>Family Resilience and Collaboration</i> Josh Baron
9:00 AM – 10:30 AM	Peer to Peer Learning Groups
10:30 AM – 10:45 AM	Break
10:45 AM – 11:45 AM	Closing Keynote <i>The Gift of Giving</i> Jim Stovall
11:45 AM – 12:00 PM	Closing Remarks
12:00 PM – 3:00 PM	Departures

WEDNESDAY SESSIONS

Morning Keynote

Family Resilience and Collaboration

Josh Barron

There is not a “silver bullet” that can make your family business last. And there are very few “best practices” in the sense that there are things that work for every family business. Each family business is unique. And what works well in one generation can be a disaster in the next. Instead, the key to making a family business endure for generations is understanding the power of family ownership. This power comes from five core rights that give the owners the exclusive ability to make almost every important choice about what happens in a family business. The owners can make choices that destroy a family business well before its time. Or they can make choices that set it up for long-term success. In this session, we will focus on understanding how your family business can activate the power of ownership to last for generations.

Closing Keynote

The Gift of Giving

Jim Stovall

Follow Jim’s journey from poverty to prosperity to purpose. As an aspiring professional athlete, Jim was diagnosed with a condition that would cause him to lose his sight. Through his own blindness, He discovered a way to make movies, television, and educational programming accessible for millions of other blind people around the world. Jim learned that entrepreneurship and success in business is a matter of serving others. “The more people we serve and the more deeply we serve them, the more we profit and prosper.” Then he discovered philanthropy which gives purpose to prosperity. A forty-year-old ten-dollar pledge turned into the first of several million-dollar gifts, demonstrating, as Churchill said, “We make a living from what we receive, but we make a life from what we give.”



BRUCE FEILER

Bruce Feiler is one of America's most popular voices on contemporary life. He is the author of seven New York Times bestsellers; the presenter of two primetime series on PBS; and the inspiration for the drama series COUNCIL OF DADS on NBC. Bruce's two TED Talks have been viewed more than two million times.

Employing a firsthand approach to his work, Bruce is known for living the experiences he writes about. His work combines timeless wisdom with timely knowledge to allow people to live with more meaning, passion, and joy. His new book, LIFE IS IN THE TRANSITIONS: Mastering Change at Any Age, describes his journey across America, collecting hundreds of life stories, exploring how we can navigate the growing number of life transitions with great purpose and skill. "One of those books that's so profoundly aligned with the zeitgeist that you end up underlining the whole book," wrote Arianna Huffington in Thrive Global. "Bruce Feiler is the perfect person to lead us on this journey." The book was a Top 10 New York Times bestseller.

For more than a decade, Bruce has explored the intersection of families, relationships, and well-being. THE SECRETS OF HAPPY FAMILIES collects best practices from the country's most creative minds. The book was featured on World News, GMA, and TODAY and excerpted in the Wall Street Journal and Parade. COUNCIL OF DADS describes how faced with one of life's greatest challenge, he asked six friends to support his daughters. The book was profiled in PEOPLE, USA Today, and Time and was the subject of a CNN documentary.

Since 2001, Bruce has been one of the country's preeminent thinkers, writers, and speakers about religion. WALKING THE BIBLE describes his perilous, 10,000-mile journey retracing the Five Books of Moses through the desert. The book was hailed as an "instant classic" by the Washington Post, spent a year and a half on the New York Times bestseller list, and has been translated into fifteen languages. ABRAHAM recounts his personal search for the shared ancestor of the monotheistic religions. "Exquisitely written," wrote the Boston Globe. WHERE GOD WAS BORN describes his trek visiting biblical sites throughout Israel, Iraq, and Iran. "Bruce Feiler is a real-life Indiana Jones," wrote the Atlanta Journal-Constitution. All were bestsellers.

Bruce is the host of two primetime series on PBS: WALKING THE BIBLE ("Beguiling," Wall Street Journal) and SACRED JOURNEYS WITH BRUCE FEILER, in which he retraces pilgrimages in France, India, Japan, Israel, Nigeria, and Saudi Arabia. ("Feiler is the perfect guide," Newsday).

Writer of the "This Life" column in the New York Times, Bruce Feiler has written for numerous publications, including The New Yorker, Parade, and Gourmet, where he won three James Beard Awards. A former circus clown, he has been the subject of Jay Leno joke and a JEOPARDY! question, and his face appears on a postage stamp in the Grenadines.

A native of Savannah, Georgia, Bruce lives in Brooklyn with wife, Linda Rottenberg, and their identical twin daughters. For more information, please visit www.brucefeiler.com.

Mastering Transitions—Tools and Takeaways for Navigating Uncertain Times

MONDAY, SEPTEMBER 27 | 1:00 PM – 2:30 PM



LONNIE GIENGER

Lonnie's passion is developing families and companies that have a lasting positive impact on society. For the last 18 years he's been learning to lead his family as strategically as he leads businesses and he regularly receives requests to coach families of influence around the world on pathways to create multigenerational family legacy and impact.

Lonnie is CEO of Wilkinson Corporation, a national real estate investment management platform that has done over \$2.4 billion of real estate transactions creating strong impact results and investment returns. He developed a company that had over 2000 employees managing their senior housing investments across the United States and is currently focused acquiring 2000-3000 apartment units per year to optimize value and positive impact on people and the planet. Lonnie also is author of the highly acclaimed book for transformational business leaders, *Beyond Business, How Your Company Can Build a Better World*.

Lonnie has been married for 37 years to his childhood sweetheart, best friend and fellow entrepreneur, Shelley. Their four adult children and their spouses all lead businesses that benefit society. And the whole family enjoys working together in various ventures and skiing, backpacking or boating from the family lodge in the Cascade mountains.

Keynote Address: Beyond Business

MONDAY, SEPTEMBER 27 | 4:45 PM – 5:45 PM



AMY HART CLYNE

Amy Hart Clyne has dedicated her career to helping prosperous families fulfill the promise and potential of their legacies and achieve wealth momentum. As Chief Knowledge and Learning Officer, Amy brings more than 25 years of experience in the ultra-wealth space. Located in Pitcairn's New York office, her primary focus is to expand the firm's position as the leader in family learning by building out its proprietary Wealth Momentum® family office model. As part of this effort, she will be responsible for the creation and development of the Pitcairn Center for Family Legacy—the company's industry think tank intended to provide unique resources, thought leadership, and educational tools to families in transition.

Most recently, Amy served as Executive Director and Chief Knowledge Officer at Family Office Exchange (FOX). There she led the organization's knowledge, learning, and education strategies culminating in over 250 live programs annually and an extensive range of thought leadership materials. As Co-Chair of the FOX Executive Council, she delivered educational experiences and practical solutions to enhance the leadership potential of family office CEOs. This, in turn, strengthened each family's capacity to remain united in the face of their unique challenges. As Chair of the FOX Thought Leaders Council, which included experts in all disciplines of private wealth, she developed proprietary content that proved both insightful and innovative in the industry.

Amy has an MBA in Marketing from Columbia Business School, Columbia University and a BA in International Relations from Colgate University. She holds the designation of CERTIFIED FINANCIAL PLANNER™ and is a candidate for Family Firm Institute's Family Business Advisor certification.

Amy is an avid skier and trained PSIA Adaptive Ski Instructor. She relishes the challenge of a tough spinning class and seeks the quiet contemplation she nearly finds every time she attempts yoga. She's a weekend gardener with no green thumb. Above all else, Amy values the power of learning. She constantly seeks out opportunities to better understand the world around her and inspire lifelong learning in others.

*The Often-Invisible Role of Women as Change Leaders—
2021 Pitcairn Gen 7 Project Study*

TUESDAY, SEPTEMBER 28 | 8:30 AM – 9:30 AM



MARTHA ESTES GROVER

Martha Estes Grover is an accomplished business women, community citizen and family leader. Martha is a third generation member of a business owning family within two family businesses. The first is Great Coastal Express where Martha assumed the CEO position as her father and founder, CE Estes implemented his succession plan. Martha led the business for over 15 years until she sold in 2002. The second is Estes Express of Richmond Virginia where she is a major shareholder and member of the board of directors and heads up the Investor Relations Committee.

In addition, Martha Grover leads her family office; MGME Holdings which comprises real estate holdings, HardRock Development Company, investments and several family foundations.

Martha graduated from James Madison University in Virginia with a degree in accounting and finance. She started her career in the financial services industry before joining the family businesses.

As a community citizen and civic leader, Martha has served on the Board of Directors for the James Madison University, James Madison University Foundation, and the Richmond Children's Museum where she was also Co-Chairman of the Development Committee. Martha has also served several terms on the Board of Directors for The Collegiate School and was the Chairman of the Centennial Capital helping to raise \$100 million for the school. She has also served on the board for the Virginia Treatment Center for Children where Martha co-chaired the Capital Campaign.

Martha Grover resides in Richmond Virginia and has three adult children, two girls and a boy.

*The Often-Invisible Role of Women as Change Leaders—
2021 Pitcairn Gen 7 Project Study*

TUESDAY, SEPTEMBER 28 | 8:30 AM – 9:30 AM



WENDY ROGERS

Wendy G. Rogers currently serves as Vice President, National Relationship Management of the Signatry, a Christian foundation that has helped families, advisors and ministries send more than \$2 billion to charities across the globe. She works with donors to build their family legacy by connecting them with creative giving solutions.

Rogers is a third-generation family business owner and former corporate leader with 25 years of experience in talent development and organizational leadership, branding and market development, financial and operational stewardship, and nonprofit strategy and governance. She spent much of her career in diverse roles for Fortune 100 and Fortune 500 companies, Dow Chemical, DuPont and Chick-fil-A, Inc.

Within her own family office, Rogers currently serves as Director, Griffin Family Investments, LLC and Director, Griffin Family Foundation, where she works in partnership with strategic advisors and family in stewarding all that has been entrusted to the Rogers family in time, talents, relationships and resources.

To enhance her financial management skills, she recently completed an executive program at Northwestern Kellogg School of Management and also received a certification in Private Wealth Management at the University of Chicago Booth School of Business. She lives in Richmond, Virginia with her husband and three daughters, but her family roots are in Georgia. Wendy received her undergraduate degree in International Business from The University of Georgia.

*The Often-Invisible Role of Women as Change Leaders—
2021 Pitcairn Gen 7 Project Study*

TUESDAY, SEPTEMBER 28 | 8:30 AM – 9:30 AM



JOSH BARON

Dr. Josh Baron is a co-founder and Partner at BanyanGlobal. For the last decade, he has worked closely with families who own assets together, such as operating companies, family foundations, and family offices. He helps these families to define their purpose as owners and to establish the structures, strategies, and skills they need to accomplish their goals. Josh is also an Adjunct Professor at Columbia Business School, where he teaches MBA courses on Family Business Management and Managing Conflict in Family Business. He also teaches in the Enterprising Families Executive Education Program.

Josh has worked with clients in North America, South America, Africa, Australia, and Asia. He began his career at Bain & Company, consulting to Fortune 500 companies. In 2000, he joined a small team of people to help build a new organization called The Bridgespan Group, which has become America's leading consulting firm for foundations and non-profit organizations. He moved on to found his own firm advising family philanthropists before joining BanyanGlobal.

Josh publishes and speaks frequently on subjects concerning family enterprises. He has a particular interest in how ownership creates a competitive advantage, how families can escape major conflicts, and how philanthropy can help families achieve their broader goals. He has written a magazine article and more than 20 digital articles about family businesses for *Harvard Business Review*, and is co-author of their *Family Business Handbook: How to Build and Sustain a Successful Enduring Enterprise*. Josh has written for *The Huffington Post*, *Trust & Estates Magazine*, and *Family Business Magazine*, among others, and has been cited in *The New York Times* and *Forbes*. He is also the author of a book about international relations.

A graduate of The University of Pennsylvania, Josh received a BS in Economics from the Wharton School of Business and a BA in International Relations with Honors. He also holds a Masters with Distinction in International Relations from the University of Cambridge and a Masters and Ph.D. in Political Science from Columbia University.

When he is not working with clients, Josh and his wife most enjoy spending time with their twins, who in their endearing ways provide endless opportunities for developing fresh insights into family dynamics.

Keynote Address: Family Resilience and Collaboration

WEDNESDAY, SEPTEMBER 29 | 7:45 AM – 8:45 AM

JIM STOVALL



In spite of blindness, Jim Stovall has been a National Olympic weightlifting champion, a successful investment broker, the President of the Emmy Award-winning Narrative Television Network, and a highly sought-after author and platform speaker. He is the author of 40 books, including the bestseller, *The Ultimate Gift*, which is now a major motion picture from 20th Century Fox starring James Garner and Abigail Breslin. Five of his other novels have also been made into movies with two more in production.

Steve Forbes, president and CEO of *Forbes* magazine, says, "Jim Stovall is one of the most extraordinary men of our era."

For his work in making television accessible to our nation's 13 million blind and visually impaired people, The President's Committee on Equal Opportunity selected Jim Stovall as the Entrepreneur of the Year. Jim Stovall has been featured in *The Wall Street Journal*, *Forbes* magazine, *USA Today*, and has been seen on *Good Morning America*, *CNN*, and *CBS Evening News*. He was also chosen as the International Humanitarian of the Year, joining Jimmy Carter, Nancy Reagan, and Mother Teresa as recipients of this honor.

Keynote Address: The Gift of Giving

WEDNESDAY, SEPTEMBER 29 | 10:45 AM – 11:45 AM

PRE-CONFERENCE WORKSHOP SPEAKER



CAROLYN GREENSPON

Carolyn Dryfoos Greenspon successfully integrates her extensive experience working with families with her passion for teaching and mentoring the next generation to assume their roles and responsibilities as leaders of the family enterprise. Through her efforts collaborating with families, they develop ways of working together that allow for better communication and more effective decision-making. She also partners with them to create family governance structures that work for a growing group of family members that span multiple generations, often with increasingly diverse perspectives.

Prior to Relative Solutions, Carolyn had a psychotherapy practice for 18 years, working with children, adolescents, adults and families. In addition to her work as a therapist, she had a private consulting practice working with multi-generational family businesses whose family members share assets.

Separate from her professional experience, Carolyn has served as both a trustee and board member of her own family enterprise. This gives her a unique perspective on helping families navigate the complexity of sharing financial and business assets. Her belief that "if you take care of the family, you take care of the business" is at the foundation of her work in the areas of ownership systems, transitions and family governance.

Carolyn received her undergraduate degree from Duke University, and her master's in social work from Simmons College in Boston. Additionally, she earned post-graduate certification in Substance Abuse Treatment and Child Psychotherapy. She is a member of the Family Firm Institute.



REBECCA A. MEYER

Rebecca brings her 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 over 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 enjoys contributing to industry publications and speaking at conferences. Her focus is exploring practical approaches to helping enterprising families address the challenges that arise from sharing financial resources.

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 in Washington, DC, is a 21/64 Certified Advisor, and a member of the Family Firm Institute (FFI).

FAMILY OFFICE SESSION SPEAKERS



KARL ANDERSON

Karl Anderson is the Vice President of Family Services & Operations of the IFO Group, LLC. Prior to joining IFO, Karl was the Vice President of Client Services for a large single family office in Chicago where he focused on estate planning and financial planning for individual family members. Before joining the family office in Chicago, Karl was a practicing attorney in the Private Wealth Services Group at McGuireWoods LLP. Karl started his career in trust administration and portfolio management at a large financial institution.

Karl graduated from the University of Illinois at Urbana-Champaign with a B.A. in History. Karl earned his law degree and LL.M. in Taxation from the Chicago-Kent College of Law.

Karl enjoys swimming, biking, and playing sports with his wife and two daughters.



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.



SCOTT CALHOUN

Scott Calhoun is a Sr. Family Strategist serving in the Family Office division of Ronald Blue & Co.

Scott has over 20 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 uncommon biblical worldview and approach in the areas of financial, estate and investment planning emphasizes a principle driven wealth transition that properly prepares and equips each generation.

Prior to joining the firm 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), and a Certified Investment Management Analyst (CIMA®).

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

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

FAMILY OFFICE SESSION SPEAKERS



BETTY DYKSTRA

Betty Dykstra is Chief Operating Officer of Nahwatzel LLC, a family office supporting four active generations of clients in 20 households. Services provided include tax planning and compliance, risk management and major transaction support. She has served as a Board member for the Private Investors Coalition since its founding in 2010.

Betty grew up on the island of Oahu. After graduation from the University of Washington, she remained in Seattle and spent time at a Big (then) 8 accounting firm and in a corporate controller setting before joining Nahwatzel in 1988. Betty lives in Seattle with her husband, and whenever time permits, enjoys visits with her two grown sons in New York City, hiking in the Cascades, and return trips to her native Hawaii.



WADE ETHEREDGE

J. Wade Etheredge is an accomplished executive with a background in business administration, operations and financial management. He served in a CFO-COO capacity with multiple rapid growth companies as a results driven leader. Executive positions include Lee & Ryan, Inc. and Chesapeake Construction, LLC as well as working at Citi Group.

Wade is currently the Family Office Executive and Chief Investment Officer for Pride Investment Partners, LLC in Indianapolis providing executive leadership for five office staff. He started the family office after the family's liquidity event in 2012. Having served in a CFO-COO capacity, he moved to the personal side after the sale. Activities include financial and operational oversight of residual business entities, direct equity investments, tax planning, portfolio investment oversight, risk management and estate planning for family members.



CHRISTINE FRANCO

Christine Franco is the Chief Executive Officer and Board Member of Chinquapin Trust Company. Located in Kansas City, Missouri, Chinquapin is a trust company/single family office that provides a full array of services to its clients including comprehensive wealth management, financial, tax and estate planning, investment planning and management, philanthropic planning and fiduciary services. Christine's professional passion is developing her team to create an exceptional experience for her clients.

Prior to joining Chinquapin, Christine spent 20 years with The Duchossois Group and served as head of the family office for the Duchossois family and well as Chief Operating Officer, Senior Trust Officer and Treasurer of Travers Trust Company. Prior to entering the family office industry, Christine was a tax manager at Ernst & Young in Chicago where she spent a year in its Moscow, Russia office.

She graduated with a Bachelor of Business Administration degree in Accountancy from the University of Wisconsin in Madison as well as her Masters of Science degree in Taxation from DePaul University.

Ms. Franco is a CPA and is a member of the AICPA and the Illinois Society of CPAs. She sits on the board of Newhouse Shelter, a domestic violence shelter located in Kansas City's urban core. In her free time, she enjoys reading, traveling and hiking, especially in Utah. Christine resides in Kansas City, Missouri with her husband, Carlos. They have 3 daughters and a new son-in-law: Alexandria and Chase, Anastasia and Ava.



JODI B. GANZ

Jodi is the Chief Operating Officer and General Counsel of Belfer Management LLC, a single-family office located in New York City. In her roles, Jodi advises on all legal matters relating to the firm, its investments, and the personal and charitable matters for family members, and has primary responsibility for operations and risk relating to IT, benefits, human resources and business continuity. Prior to joining Belfer Management in 2013, Jodi served as General Counsel at Greenhill & Co., Inc., a publicly-traded M&A advisory firm and at GCP Capital Partners, the middle market, private equity spinout from Greenhill. Jodi started her career at Davis Polk & Wardwell, where she practiced in capital markets, M&A and investment management in both New York and London.

Jodi received her A.B. in Public Policy Studies from Duke University and her J.D. from Fordham University School of Law, where she was Editor-in-Chief of the Fordham International Law Journal. Jodi lives in NYC with her husband, two teenage kids and their Labrador puppy. In her free time, she is a rabid fan of the USWNT, plays on a co-ed recreational team and is a certified and active youth soccer referee.

FAMILY OFFICE SESSION SPEAKERS

**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.

**DAVID R. HUBBARD**

Mr. Hubbard is Vice President, Marketing at AIG Private Client Group in Los Angeles. Private Client Group provides innovative insurance products and risk management services exclusively for high net worth and ultra high net worth individuals and family offices.

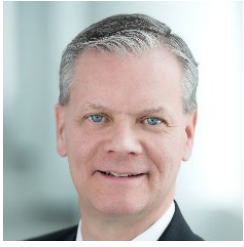
Mr. Hubbard currently oversees the Family Office practice at AIG Private Client Group, which includes the national development, distribution and implementation of unique insurance products and personal risk management services for members of family offices, as well as their executive staff. He also oversees the AIG Equine Practice, promoting personal insurance and risk management services to owners of valuable horses.

Mr. Hubbard is a certified Continuing Education Trainer in California, where he presents on the subjects of risk management and personal insurance to property and casualty Insurance Brokers, Financial Planners, Certified Public Accountants, and other professional groups.

Prior to joining Private Client Group in 2002, Mr. Hubbard was at Marsh Private Client Services in Los Angeles. During the 16 year period with Marsh & McLennan Companies, he provided sales management, consultation and insurance services to high net worth clients, family offices, and business management clients.

Mr. Hubbard earned a Bachelor of Marketing degree from St. Cloud State University in St. Cloud, MN, and has resided with his family in the Los Angeles area for his entire insurance career. His hobbies and interests include home improvement and the outdoors.

FAMILY OFFICE SESSION SPEAKERS



JIM KANE

Jim Kane began his insurance career in 1985 with General Accident Insurance as a marketing trainee. After three years on the insurance company side of the business, Jim accepted his first position as a broker with Louis P. Sigel & Sons as Personal Lines Manager. He would go on to serve in similar roles for regional and national brokerages including Posse Walsh Buckman Van Buren, CBIZ and PLI Brokerage. In 2005 with the acquisition of PLI by HUB International, Jim was named President of HUB Personal Insurance. In January 2014 Jim accepted the post of Senior Vice President of Personal Insurance at USI Holdings. USI is headquartered in Valhalla New York and is current the second largest privately held personal insurance agency in the US.

Jim is a graduate of the University of Notre Dame with a Bachelor of Arts degree in Government and International Relations. He continues to support his alma mater with participation in the Alumni Association. Jim served on the Board of the Notre Dame Club of Philadelphia for more than a decade including two years as Club President.

Jim has long been committed to education and thought leadership as part of career development. In addition to holding both the Certified Insurance Counselor and Certified Risk Management designation, he was an instructor for the Insurance Society of Philadelphia for a decade. Jim taught numerous courses including CPCU 2 Personal Insurance Risk Management Principles. He has published articles for *The John Liner Letter*, *WORTH Magazine* and *Fox Connects*. He has contributed his insurance expertise to articles published in *The New York Times*, *The Wall Street Journal*, *Private Wealth Magazine*, and industry white papers. He has also appeared as a speaker at various wealth management conferences including Institutional Investor, Institute for Private Investors, Family Office Exchange and Family Wealth Advisor. He is currently the Conference Chair for the Southeast Family Office Forum held annually in Atlanta GA. Jim is the 2014 recipient of the Michael Brink Award from the Family Office Review for dedicated service to the Family Office Community.

Jim is an active member of his community serving on the Board of Regina Dominican College Prep in Wilmette IL and the Private Risk Management Association. Jim and his family reside just outside his hometown of Philadelphia.



LAURA LIANG

Laura Liang is Senior Vice President of Operations and Accounting for the Dan L Duncan Family Office and the Chief Grants Officer for the Dan L Duncan Foundation. Laura has worked in this family office since its formal inception in 2000. In her capacity Laura leads all aspects of the back office and compliance requirements for the Duncan Family Office and the Dan L Duncan Foundation.

In addition to her duties in the various Duncan Family entities, Laura is a past director of the Private Investor Coalition, and past board member of Heroes for Children and Girl Scouts of San Jacinto Council.



JASON MANN

Jason currently serves as a Vice President for Petrus Trust Company, LTA, the governing body for the Family Office of the Perot Family in Dallas, TX. Petrus Trust Company, LTA is a multi-generation, single-family office providing a full in-house suite of services including tax compliance, Family accounting (with payroll & bill pay), legal structuring, investment advisory/accounting/reporting, property management, insurance, IT, foundation governance, and personal administration/household support.

Jason joined the Family's operating real estate business, Hillwood in 1998 and transitioned to the Family Office in 2010. His primary responsibilities include oversight of all Family federal and state tax matters, security administration for treasury functions, and collaborating with senior leadership on various other management responsibilities.

Jason is a Certified Public Accountant licensed in Texas and holds a BBA degree from Baylor University. He is a member of the Texas Society of CPA's and AICPA. He lives in Southlake, TX with his wife Kara and has a college baseball pitcher (Ethan) and high school tuba player (Emma).

FAMILY OFFICE SESSION SPEAKERS



KRISTIN B. MARTIN

Kristin Martin is the Manager of Accounting and Administration for 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 550 locations in 41 states with more than 30,000 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.

Kristin is a Certified Public Accountant. Her prior job experiences include 7 years in public accounting and various positions in private industry.

Kristin is a member of the AICPA and the Oklahoma Society of CPAs. She has a passion for children's health and well-being and as such she has held a variety of volunteer positions within the Oklahoma City and Yukon, Oklahoma, public school systems. For the last 20 years, she has been an active volunteer in children's ministry within her church.

FAMILY BUSINESS SESSION SPEAKERS



COOPER BIERSACH

Principal, BiersachGroup and Adjunct Asst. Professor, UNC Kenan-Flagler Business School

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.



DAN HATZENBUEHLER

Daniel B. (Dan) Hatzenbuehler is the retired Chairman and CEO of E. Ritter & Company, a fifth generation Arkansas family business located approximately 45 minutes northwest of Memphis, TN, and is married to a fourth-generation descendant of Ernest Ritter. He has written and spoken at several family business conferences on family and business governance and next generation engagement and education, and currently serves on one family business board as an independent director. He is also currently the Family Business Leader-in-Residence at the Family Enterprise Center at the UNC Kenan-Flagler Business School.



ERIK KESTING

Erik B. Kesting is the current Board Chair for E. Ritter & Company. He is a fifth-generation Ritter family member and also chairs the family's Owners Committee. Erik holds a Bachelor of Science from Tufts University and a Master of Divinity from Harvard University. He previously worked at the global healthcare software company, Epic, where he held various roles from 2010-2019. Erik is a New England native and now resides in Madison, Wisconsin, where he is a founding partner of the Biergarten at Olbrich Park and volunteers for the Wisconsin Technology Council.

FAMILY BUSINESS SESSION SPEAKERS



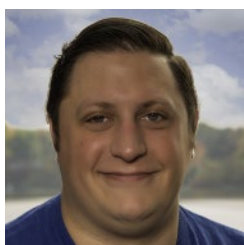
STEPHEN P. MILLER

Steve Miller is a family business expert, co-founder of the Family Enterprise Center at UNC's Kenan-Flagler Business School, and Adjunct Assistant Professor of Organizational Behavior. His research focuses on next-generation leadership development in family-owned enterprises.

Steve works with family businesses and his students to help them create world-class, sustainable enterprises. His approach is to collaborate with family business leaders to develop and employ strategies designed to align business, family, and ownership goals. He draws on his 35 years of experience as the top non-family executive of the Vanderbilt/Cecil family-owned Biltmore Estate in Asheville, N.C., where he played a key role in making Biltmore the most visited historic home in the United States, with over 1.5 million visitors each year.

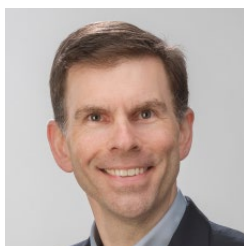
Steve is president of GenSpan, Inc. in Asheville, NC. In that role, he consults on succession planning, leadership development, and strategy for The Biltmore Company and other large family business clients. He has served on many private, public, and non-profit boards; and is currently Chairman of the Board of Draper & Kramer, a family-owned real-estate development and management firm based in Chicago. He also serves on the board of Riverbend Malt House in Asheville, which supplies malted grains to craft brewers and distillers.

Miller earned his PhD in Management at Case Western Reserve University. He graduated Phi Beta Kappa from the Undergraduate Business Program at UNC Chapel Hill and completed the Advanced Management Program at Harvard Business School.



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.



TED WENTZ, III

Ted has served as Quadratec's CEO since 2017 after also working at this family's business from 2008-2009 in a leadership rotation integrating himself with every part of Quadratec's warehouse, call center, catalog, Internet, purchasing and marketing departments. He also served in Marketing Analysis and Strategic Planning for Quadratec. Prior to re-joining Quadratec as CEO Ted founded FireCraft, Inc., an outdoor cooking e-commerce company. In his early career, Ted served at the Department of Homeland Security. He lives in Malvern, Pennsylvania with his wife Susan and their two children, Teddy (10), and George (8). He holds an undergraduate degree from the University of Virginia and an MBA from the University of North Carolina's Kenan-Flagler Business School. Ted currently serves on the Specialty Equipment Market Association (SEMA) Board and the Kenan-Flagler Family Enterprise Center Board.



TED WENTZ, JR.

Ted Wentz Jr. is the founder of Quadratec and currently serves as its Chairman of the Board and Chief Financial Officer. Under his leadership, the company transformed from a small catalog-based start-up operation into the world's largest independent retailer of aftermarket Jeep products and accessories. His calculated risk-taking, combined with deep automotive industry knowledge was instrumental as Quadratec successfully pivoted from strictly catalog sales into the digital age. Prior to creating Quadratec in 1990, Ted attended the University of Pennsylvania before turning to professional automotive racing. He was championship-winning formula car driver in Europe during the 1970s. Ted resides in Villanova, PA and Naples, FL with his wife Elizabeth and has two children, Ted III and Ashley.

FAMILY BUSINESS SESSION SPEAKERS



JACK WILDER

Jack Wilder is a current Board Member for E. Ritter and Company, in addition to working in Marketing at The Hershey Company as Director of Chocolate Portfolio and Marketing Operations. He has also served on a variety of committees for ERC involving charter drafting for the Family Council, key ownership issues, direct investment strategy, and more, as well as serving as Family Council President. He has received both his MBA and BSBA from the UNC Kenan-Flagler Business School. Jack lives in Hershey, PA with his wife and three children.



KATY WILDER SCHAAF

Katy Wilder Schaaf is a current Board Member for E. Ritter and Company. She is a fifth-generation Ritter Family Member and has served in a number of family governance roles including Philanthropy Committee, Next Generation Committee, Ownership Committee, and Chair of the Ritter Family Council. Katy serves on the Board of Directors for Innerwill (a values-based leadership nonprofit) and the Family Business Magazine Advisory Board. She has her B.S. in Psychology and Sociology (University of North Carolina at Chapel Hill), M.S. in Marriage and Family Therapy (University of Maryland), and Ph.D. in Psychology (Virginia Commonwealth University). Katy lives in Richmond, VA with her husband and two children; she works in private practice as a Licensed Clinical Psychologist.



DAVID A. WORTH

David Worth is the Executive Director of the Family Enterprise Center at the University of North Carolina's Kenan-Flagler Business School. David began his career in family business over 20 years ago and worked his way through all areas of Shamrock Corporation until becoming CEO and then owner after a successful third generation transition. His family of businesses rebranded as Worth Industries, Inc. and he remains an owner and Chairman of the Board. He has guided strategic sessions and developed transition plans to ensure good stewardship of family capital and continued business success while maintaining positive relationships among family members. David is chief promoter of the Family Enterprise Center vision to be the school of choice for family enterprise leaders and their families seeking the knowledge, skills and connections to achieve business, family, and personal goals.



DAVID M. WORTH

David M. Worth is the former CEO of Shamrock Corporation, a multi-business family enterprise located in Greensboro, North Carolina now known as Worth Industries, and current owner of SDR Properties, a commercial real estate firm also located in Greensboro.

As CEO of Shamrock, David led the traditional packaging business in to new markets, creating the largest product fundraising company catering to schools in the USA, and expanding in to adjacent manufacturing and distribution businesses.

Now, David enjoys guiding the next generation of leadership at the family enterprises as a board member and finance partner while spending more time with his grandkids at his favorite retreat on the NC coast.



JON WORTH

Jon Worth serves as President of EFW Warehousing, EFW's full-service warehousing network. Until EFW acquired it in 2020 and EFW Warehousing was established, Jon led Lewis Logistics, a North Carolina-based warehousing, distribution, and logistics provider specializing in long-term, contract logistics. After graduating from the University of North Carolina at Chapel Hill Kenan-Flagler Business School, Jon joined a 3PL in Charleston, South Carolina. He rose through the ranks, eventually following his entrepreneurial spirit back home to Greensboro, North Carolina, where Worth Industries, his family business, acquired Lewis Logistics in 2017. Under his leadership, the company grew to over 1,000,000 square feet of distribution space and sustained a compounded annual growth rate of 60%. With a passion for team building, Jon's mission is to build customer-focused teams and establish EFW Warehousing as the premier provider of flexible warehouse solutions and contract logistics.

FAMILY CONNECTION SESSION SPEAKERS



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.



DR. JOSH BARON

Dr. Josh Baron is a co-founder and Partner at BanyanGlobal. For the last decade, he has worked closely with families who own assets together, such as operating companies, family foundations, and family offices. He helps these families to define their purpose as owners and to establish the structures, strategies, and skills they need to accomplish their goals. Josh is also an Adjunct Professor at Columbia Business School, where he teaches MBA courses on Family Business Management and Managing Conflict in Family Business. He also teaches in the Enterprising Families Executive Education Program.

Josh has worked with clients in North America, South America, Africa, Australia, and Asia. He began his career at Bain & Company, consulting to Fortune 500 companies. In 2000, he joined a small team of people to help build a new organization called The Bridgespan Group, which has become America's leading consulting firm for foundations and non-profit organizations. He moved on to found his own firm advising family philanthropists before joining BanyanGlobal.

Josh publishes and speaks frequently on subjects concerning family enterprises. He has a particular interest in how ownership creates a competitive advantage, how families can escape major conflicts, and how philanthropy can help families achieve their broader goals. He has written a magazine article and more than 20 digital articles about family businesses for *Harvard Business Review*, and is co-author of their *Family Business Handbook: How to Build and Sustain a Successful Enduring Enterprise*. Josh has written for *The Huffington Post*, *Trust & Estates Magazine*, and *Family Business Magazine*, among others, and has been cited in *The New York Times* and *Forbes*. He is also the author of a book about international relations.

A graduate of The University of Pennsylvania, Josh received a BS in Economics from the Wharton School of Business and a BA in International Relations with Honors. He also holds a Masters with Distinction in International Relations from the University of Cambridge and a Masters and Ph.D. in Political Science from Columbia University.

When he is not working with clients, Josh and his wife most enjoy spending time with their twins, who in their endearing ways provide endless opportunities for developing fresh insights into family dynamics.

FAMILY CONNECTION SESSION SPEAKERS



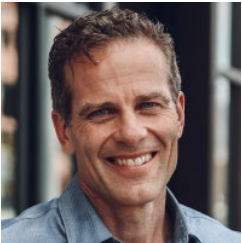
AMY HART CLYNE

Amy Hart Clyne has dedicated her career to helping prosperous families fulfill the promise and potential of their legacies and achieve wealth momentum. As Chief Knowledge and Learning Officer, Amy brings more than 25 years of experience in the ultra-wealth space. Located in Pitcairn's New York office, her primary focus is to expand the firm's position as the leader in family learning by building out its proprietary Wealth Momentum^o family office model. As part of this effort, she will be responsible for the creation and development of the Pitcairn Center for Family Legacy—the company's industry think tank intended to provide unique resources, thought leadership, and educational tools to families in transition.

Most recently, Amy served as Executive Director and Chief Knowledge Officer at Family Office Exchange (FOX). There she led the organization's knowledge, learning, and education strategies culminating in over 250 live programs annually and an extensive range of thought leadership materials. As Co-Chair of the FOX Executive Council, she delivered educational experiences and practical solutions to enhance the leadership potential of family office CEOs. This, in turn, strengthened each family's capacity to remain united in the face of their unique challenges. As Chair of the FOX Thought Leaders Council, which included experts in all disciplines of private wealth, she developed proprietary content that proved both insightful and innovative in the industry.

Amy has an MBA in Marketing from Columbia Business School, Columbia University and a BA in International Relations from Colgate University. She holds the designation of CERTIFIED FINANCIAL PLANNER™ and is a candidate for Family Firm Institute's Family Business Advisor certification.

Amy is an avid skier and trained PSIA Adaptive Ski Instructor. She relishes the challenge of a tough spinning class and seeks the quiet contemplation she nearly finds every time she attempts yoga. She's a weekend gardener with no green thumb. Above all else, Amy values the power of learning. She constantly seeks out opportunities to better understand the world around her and inspire lifelong learning in others.



LONNIE GIENGER

Lonnie's passion is developing families and companies that have a lasting positive impact on society. For the last 18 years he's been learning to lead his family as strategically as he leads businesses and he regularly receives requests to coach families of influence around the world on pathways to create multigenerational family legacy and impact.

Lonnie is CEO of Wilkinson Corporation, a national real estate investment management platform that has done over \$2.4 billion of real estate transactions creating strong impact results and investment returns. He developed a company that had over 2000 employees managing their senior housing investments across the United States and is currently focused acquiring 2000-3000 apartment units per year to optimize value and positive impact on people and the planet. Lonnie also is author of the highly acclaimed book for transformational business leaders, *Beyond Business, How Your Company Can Build a Better World*.

Lonnie has been married for 37 years to his childhood sweetheart, best friend and fellow entrepreneur, Shelley. Their four adult children and their spouses all lead businesses that benefit society. And the whole family enjoys working together in various ventures and skiing, backpacking or boating from the family lodge in the Cascade mountains.

NEXT GEN SESSION SPEAKERS



GAIA MARCHISIO

Gaia Marchisio, the Executive Director at the Cox Family Enterprise Center, brings energy, wit and stunning insight to her work with family enterprises and their advisors. Through visiting scholar appointments at educational institutions across the globe, development of educational materials for training family enterprise consultants and work with families in a variety of industries globally, Gaia illuminates the field of family enterprise advising with her diverse perspectives. A discerning facilitator, renowned educator, esteemed speaker, innovative researcher and compassionate resource, Gaia is a force of positivity for family enterprises and their advisors.

A fourth-generation successor in her own family business, her personal foundation instilled her with a strong sense of compassion and empathy. Since, her academic and professional training has given her the perspective to reach beyond her own experiences and fully dedicate herself to families and their enterprises.



WENDY SAGE-HAYWARD

Wendy is an Adjunct Professor at the University of British Columbia's Sauder School of Business and a senior consultant at the Family Business Consulting Group. She has over 25 years of experience working with business leaders, family firms, and boards. As an educator, consultant, author, and adjudicator with a family business member/director background, Wendy brings deep knowledge, perspective, and passion to serving a diverse set of global clients. She has experience working with enterprising families who have immigrated to Canada from China and have bi-cultural influences within their family and business system.

Wendy is especially skilled at facilitating meaningful conversations with multi-generational families on family development, leadership, next generation preparation, governance, and conflict resolution. In every instance, she develops compelling frameworks, sharp insights, and practical solutions to ensure her clients achieve their goals while maintaining family harmony.

Wendy's work as an educator informs her approach to client engagements and helps her contribute to the development of other advisors. She teaches and mentors advisors across Canada and in the United States on how to serve their family enterprise clients with greater understanding of their complex family landscape. At UBC she conducts multi-family sessions for business owning families through the Business Families Centre. Previously, Wendy was faculty at the Institute for Corporate Directors, where she taught board dynamics in the Director's Education Program through the University of Toronto's Rotman School of Management.

Wendy is co-author of the book *Human Resources in Family Business: Maximizing the Power of Your People*, a definitive work on family firm HR that showcases her knowledge of the human factor in family business and offers numerous helpful frameworks and tools for family enterprises. She has also authored and co-authored a dozen articles on topics such as risk management, human resources, managing change, continuity planning and ownership development across life stages.

Wendy regularly presents at conferences in North America on a range of family business topics such as continuity, governance, family communication, conflict resolution, and leadership development. Her speaking engagements in 2019-2020 include the Family Firm Institute, FEX Symposium, Transitions East, Transitions Canada, Business Transitions Forum, and the Purposeful Planning Institute.

Wendy is a Lead Instructor and Adjudicator for the Family Enterprise Exchange, a role that ensures she brings a sense of objectivity and fairness to tricky issues at the intersection of family and business. Additionally, she is certified in Insights Discovery™, the BarOn Emotional Quotient Inventory (EQ-i)™, and Ethical Fitness™. She is also certified as an Ontological Coach from the Newfield Network.

Wendy was a member of a U.S. family firm over 135 years old, and former director on its board of directors. The business had about 50 cousin partners from the third through sixth generations. Several branches recently exited the business including Wendy's branch. This background in family business motivated Wendy to dedicate her career to the needs of family enterprises. She currently owns and operates a business with her family in the Gulf Islands.

Wendy has a Master's in Family Systems Counseling Psychology from the University of British Columbia and an Executive Master's in the Neuroscience of Leadership from the Neuroleadership Institute. She lives in Vancouver, British Columbia with her husband and two sons.

FAITH AND FAMILY SESSION SPEAKERS



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.



LEE HABEEB

Co-Creator and Co-founder of the Laura Ingraham Show in 2001, it became the #1 show in its time slot by 2006, reaching nearly 400 affiliates and 7 million listeners.

Habeeb was then asked to lead the content and production team at Salem Radio Network, where he has been since 2007. He is Vice President of Content, overseeing the production and sales teams of 5 of the top 15 shows in America: The Bill Bennett Show, The Dennis Prager Show, The Hugh Hewitt Show, The Mike Gallagher Show, and The Michael Medved Show.

Most recently, he is the founder of American Private Radio, whose mission is to "Tell the story of America to Americans." APR's flagship storytelling radio program *Our American Stories* has 3.8 million weekly listeners on 308 radio affiliates.

He is a regular Newsweek columnist and a University of Virginia School of Law graduate.

PREMIUM PARTNERS



EDUCATIONAL PARTNERS



ASSOCIATION HOSTS



NOTES

