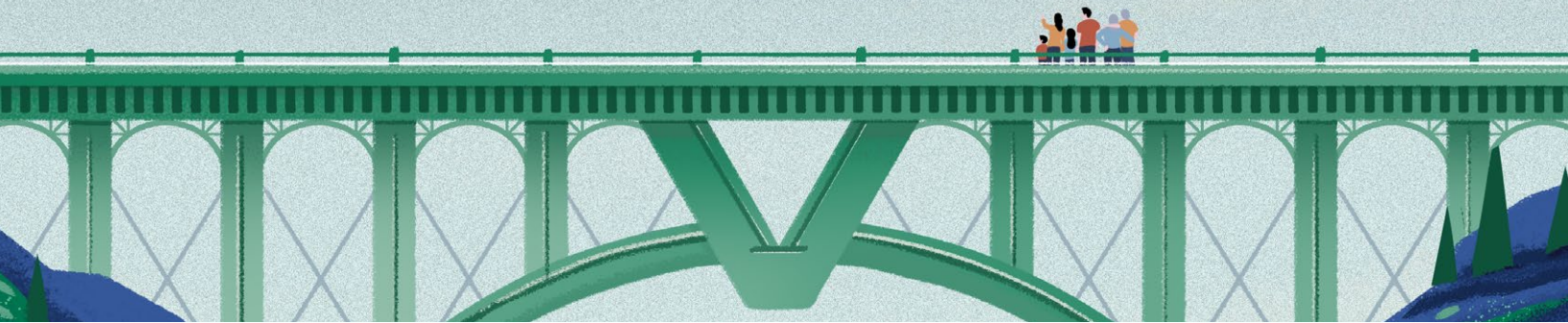


BUILD AN ENTERPRISE FAMILY WORKSHOP

48 STRATEGIES TO DEVELOP A SUSTAINABLE ENTERPRISE



This workshop provides a roadmap for owners wanting to build an enduring enterprise that encompasses more than a single business. It's important to develop an enterprise mindset when the family faces the complexity that comes with owning multiple businesses, properties, investments, and/or philanthropic endeavors.

Our comprehensive guidebook offers a structured approach to creating and sustaining an enterprise that thrives across multiple generations. This workshop is for leaders who want to integrate family goals across all enterprise domains using a clear, cohesive planning process. Bring up to four members of your strategic planning team (family leaders, board members, or senior managers) to learn how to develop your roadmap for a lasting enterprise family.

Attendees will explore the **Family Journey**, generating a shared understanding of the benefits of aligning family interests and goals. The **Enterprise Journey** leads to a shared vision for the future enterprise and the actions needed to implement that vision. The **Personal Journey** is for family members searching for a rewarding role in the family and the enterprise.

Peer groups walk through all three stages of the process together: where you are today, where you want to go, and how you want to get there.

FEBRUARY 5-6, 2025

Hotel Colonnade
Coral Gables, FL

FAMILY JOURNEY

Explore 15 milestones and generate a shared understanding of the benefits of aligning family interests and goals.

ENTERPRISE JOURNEY

Introduces 18 milestones that lead to a shared vision for the future enterprise and the actions needed to implement.

PERSONAL JOURNEY

For next generation family members searching for their role in the family and the enterprise.

Comments from prior workshop attendees

"The goal is for every family member to be 'fully capitalized.' This workshop makes me focus on how concepts can be implemented and institutionalized so they are not one-time discussions"

- Family Member and Family Office CEO

"We are leaving with more tools for integrating the next gen and spouses into the family office. We are leaving with new options and tactics that make me hopeful."

- Family Member and Board Member

"Having multiple family members attend, along with an outside board member led to great progress and learning. It was an environment where we could think strategically and share our vision for the family."

- Family Member

CO-SPONSORED BY:



Family
Office
Exchange

**ENTERPRISE FAMILY
ADVISORS**

QUESTIONS ANSWERED IN BUILD AN ENTERPRISE FAMILY TO LAST

THE FAMILY JOURNEY

- How do values and guiding principles impact the family's future together?
- What are sound policies for inclusion and responsible ownership?
- How can you develop owners' skillset for managing or reducing enterprise complexity?
- How can you design a learning culture that fosters participation among owners?
- How do you design an equitable, objective process for leadership development and selection?

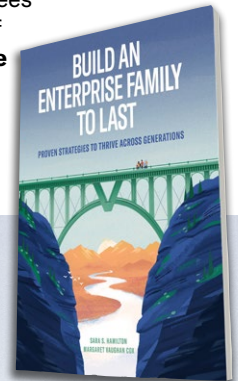
THE ENTERPRISE JOURNEY

- What are the benefits of building a multi-generational enterprise?
- What opportunities and risks will challenge your enterprise in the future?
- How does the family develop a shared vision and goals for the future of the enterprise?
- What leadership skills will be needed to support the vision and goals?
- How do you design a governance system that supports a complex enterprise?
- What metrics should be used to monitor and measure the enterprise's performance and satisfaction of its owners and stakeholders?

THE PERSONAL JOURNEY

- How knowledgeable are you and others within your generation on the operations of your family's enterprise? What's been your involvement to date?
- What unique character traits and skills do you have, or are developing, you feel would allow you to best contribute to the family enterprise?
- What areas are of the most interest to you? What opportunities can you identify to build knowledge and experience?

All workshop attendees will receive a copy of **"Build an Enterprise Family To Last."**



BUILD AN ENTERPRISE FAMILY WORKSHOP

WHO SHOULD ATTEND

This workshop is valuable for family leaders, board members and family office executives who are involved in strategic planning for the enterprise and the engagement of the family. We encourage groups of family members to attend together, so they share the learning, brainstorm new ideas and prioritize strategies for the future.

WORKSHOP CONTENT The program runs from 9:00 AM - 5:00 PM each day. A group dinner will be held on February 5.

THE FAMILY JOURNEY

Where we've been and where we are today

- Map family history
- Assess current culture and behaviors
- Identify core values and responsible ownership

Where we want to go

- Align family interests
- Assess readiness for change
- Build a learning culture

How we plan to get there

- Identify trusted decision making process
- Design leadership selection policies
- Offer opportunities for participation/engagement

THE ENTERPRISE JOURNEY

Where we've been and where we are today

- Review benefits of current enterprise
- Assess identity and impact
- Investigate opportunities and risks

Where we want to go

- Develop future scenarios
- Articulate a shared vision
- Identify leadership skills and a succession process

How we plan to get there

- Design efficient governance framework
- Develop process to assess and mitigate risks
- Develop a written enterprise charter to document goals and agreements

THE PERSONAL JOURNEY

- Map personal journey to identify personal goals
- Inventory personal skills and interests
- Consider skills needed for future enterprise leaders
- Identify desired personal role(s) and engagement levels
- Create opportunities to demonstrate leadership skills

More comments from prior workshop attendees

"It's clear to me that there is so much risk for families who don't invest in the Family Journey and so much to be gained by investment in it."

- Family Enterprise Board Director

"We have new clear metrics to measure the intangibles (such as belonging, fulfillment, and return on human capital)."

- Family Member and Family Office Board Co-chair

"This book is phenomenal. It provides common language and a collaborative tool for the family. I'm going to give copies of it to my whole leadership team."

- Family Office CEO

WORKSHOP COST

	FOX MEMBERS	NON MEMBERS
Individual attendee	\$5,000 USD	\$6,000 USD
Multiple attendees from the same family or firm	\$4,500 USD	\$5,500 USD

Group rates for hotel rooms are available at \$389 per night, until January 14, 2025.



SARA HAMILTON

**Founder and Board Chair, Family Office Exchange
Co-founder, Enterprise Family Advisors**

Sara founded FOX as a peer network for family office executives in 1989. Within 10 years, she could see that families needed help with family governance and managing leadership transitions, in addition to their family offices. As a result, FOX became an advisor to family enterprises and created a platform for sharing family enterprise best practices. Today, Sara provides strategic direction for FOX as Board Chair and supports the development of new services for FOX members - 320 enterprise families and 80 wealth advisory firms in 25 countries. Sara is the co-author of *Build an Enterprise Family to Last* and *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times*. She serves on the executive education faculty of the University of Chicago Booth School of Business as an adjunct faculty member for their Private Wealth Management course, and she is a co-creator and instructor for the Responsible Ownership for Enterprise Families program at Vrije University in Amsterdam. You can reach Sara at sara@familyoffice.com.



ANN M. DUGAN

Family Business and Enterprise Consultant, Ann Dugan LLC

Ms. Dugan learned first-hand the dynamics of families in business as a 4th generation member of a business owning family in the lumber and building supply industry in Georgia. Ms. Dugan was the founder entrepreneur of one of the earliest entrepreneurship and family business centers in the US where she also served as Assistant Dean of the Katz Graduate School of Business at the University of Pittsburgh. Ann served as the Consulting Director for Family Office Exchange (FOX) from 2016-2000, working with family businesses, focused on timely decision making, building sustainability and continuity of family enterprises sharing joint history, operating businesses and investments. Ann joined the board for the National Philanthropic Trust in 2019 and currently serves on several other private company boards. She is a Fellow at Cornell University Smith Family Initiative. You can reach Ann at ann@aduganllc.com.



MICHELLE JEZYCKI

Founder and President, Trifecta Consulting

Ms. Jezycki is the Founder and President of Trifecta Consulting, a human resources management company. Trifecta specializes in leadership development, executive coaching, human resources development, strategy and business management. As part of Trifecta, Michelle serves as HR Advisor to several families and their family offices, both in the U.S. and abroad. Michelle is the former Director of Human Resources at the United States Senate and was recently elected to public office as a trustee/council member in Incline Village, Nevada. She is a Visiting Associate Professor at the American University in Bulgaria teaching leadership in their EMBA program. You can reach Michelle at michelle@trifecta-consulting.org.