



News Briefs

July 2001

Welcome New Members and New Sponsors!

The Forum is pleased to welcome four new businesses to the Forum. **Matthews Tire & Auto Centers** and **Belson Company** are our newest family business members. **BCI Group** and **Affinity Health Systems** have joined us as sponsors.

Matthews Tire & Auto Centers is a second generation business with six active family members and five locations: Appleton, Green Bay, Fond du Lac, Menasha, and Waupaca. Debbie Duesing and Trevor Rezner, children of the founder and president, Dennis Rezner, began their membership by participating in the Best Practices meeting in June.

Belson Company is a third generation business with two active family members: Thomas Biebel, chairman of the board, and his son, Randy Biebel,

vice president and COO. Belson is a distributor of retail and industrial packaging products and janitorial maintenance items. Several of you met Randy when he was our guest at the March workshop.

We are exceedingly pleased at the addition of these new members and of the growth of the Forum this year. The Forum includes 29 family business members and eight sponsors. As our organization grows, each of our members has access to an increased wealth of family business knowledge and experiences.

The profile of family business members is quite impressive. The combined Forum membership:

- has revenues over \$1.2 billion in annual sales,
- employs over 4,650 people,
- includes 140 actively employed family members, and
- includes three businesses over 100 years old.

The following table highlights the richness of Forum membership.

Leadership Generations Represented		Sales in millions		Family Members in the Business		Number of Employees		Business Types	
Generation	# of members	Range	# of members	Range	# of members	Range	# of members	Type	# of members
1	6	1-4	7	1-5	19	1-50	8	Construction	6
2	11	5-9	3	6-10	7	21-100	5	Distributor, contractor	3
3	7	10-24	5	11-15	3	101-200	8	Extractor	1
4	5	29-49	5			201-400	6	Manufacturer	11
		50-74	7			401-700	1	Printer/publisher	1
		100-149	1			700-	1	Property management	1
		Over 200	1					Recycling	1
								Retailer, wholesaler	4
								Transportation	1

Our New Sponsors!

In April, we welcomed Marketlink Inc. As of July 1st, we are pleased to welcome two additional sponsors. **Affinity Health Systems** and **BCI Group** have agreed to provide us with their expertise and their financial support.

Kevin Nolan, president of **Affinity Health Systems**, Menasha, received our request and welcomed the opportunity to provide their support and expertise to the Forum. Affinity is an integrated regional health network that offers a broad array of health care services to more than a dozen northeast Wisconsin communities. As a mission-driven organization, Affinity promotes the health and well-being of local communities through the sponsorship of a broad array of community-focused, charity-based programs and services.

BCI Group offers a full range of services to support the ongoing consulting and administration services necessary for successful ESOPs, defined benefit plans, 401(k) plans, profit sharing plans, and various other qualified plans. Dennis J. Long is the Founder, CEO, and Chairman of BCI Group. Dennis has been involved in the retirement benefit industry since 1974.

Congratulations to the Sponsorship Committee members for their accomplishments in adding three more sponsors with business expertise important to family business owners.

The Forum is fortunate to be sponsored by extremely well-qualified professionals in the areas of wealth management and transfer, commercial banking, law, accounting, tax, management consulting, marketing, health services, retirement benefits, and more. These sponsors are available at meetings and by phone to assist our family business owners (see the back page).

Managing the Family Business and the Business Family

Liberty Hall, Kimberly
September 5, 7:00—10:00 a.m.

As Michael Ariens, our speaker, reminds us “the family business is the original business paradigm, but like any business today, managing a family business is as much an art as a science.”

Michael Ariens is Chairman of the Board of Ariens Company, a manufacturer of outdoor power equipment. He has been with Ariens Company since 1959 and served in a variety of capacities over the years. Ariens Company is a privately held business that has been located in the Brillion community since 1933.

In 1996, Michael’s son Daniel Ariens became the president of Stens Corporation, an aftermarket parts

marketer acquired by Ariens Company in 1995. In 1998, Dan became president of Ariens Company and his brother, Peter, became president of Stens.

Michael has studied family business transitions and has been a member of many Boards, including those of Schneider National Inc. and U.S. Oil Company. He will talk with us about what he has learned about managing the business and the family.

2nd Annual

Golf Outing & Dinner

Mascoutin Golf & Supper Club

The one beautiful, rain-free day during the week of June 4th was the day of our Second Annual Golf Outing & Dinner. The 9-hole scramble teed-off about 1:30 p.m., with family members and sponsors enjoying refreshing weather and networking.

By 5:30 p.m., all the golfers were back at the club house enjoying the late afternoon sun and a few “cool ones” before dinner. About 6:30 p.m., thirty-one hungry golfers and their guests began grilling steaks and chicken.

During dinner, everyone took advantage of the opportunity to get better acquainted with members and sponsors.

Members and sponsors brought logo items as door prizes. Awards were also presented for golf accomplishments.

Member and Sponsor News

Did you know that **Jim Janes**, president of Oshkosh Marine Supply, is on the Board of the Independent Business Association of Wisconsin?

Badger Mining Corporation acquired a Las Vegas cat litter packaging company, Applied Industries, Inc. The acquisition will not only package Badger’s high-grade product lines of zeolite but will also package private label cat litters in various size containers, including bags, jugs and pails.

Jim Neumann, president of RB Royal Industries, wisely answered a letter from a 3rd grade student, leading to a visit from the entire class of *future employees*. RB concluded the tour with a snack of milk and cookies and a small token of the visit — a pin, which proudly states they toured RB Royal.

RB Royal Industries, Inc. of Fond du Lac broke ground on their new 90,000 square foot, \$8.3 million manufacturing and office facility. The new facility will be located on the company’s 16 acres in Fond du Lac’s new Southwest Industrial Park. The construction schedule calls for RB Royal to begin moving

manufacturing equipment to the new location December 4, 2001. The complete operation is scheduled to be up and running at the new location by the end of the first quarter of 2002.

Do you know that **Craig Smith**, president of Retained Earnings Company, received “Family Business Specialist” certification from American College, Bryn Mawr, Pennsylvania?

If you have news about your business or family, send it in for inclusion in a future issue. It’s nice to know what our members and sponsors are doing.

Successors Group

Darcy Lemmers will host the Successors meeting at Zander Press, Brillion, on July 11. The group will tour the business and the discussion will consider:

- The actual logistics of taking over the business as the next generation (what others have planned or experienced).
- How to set up control and ownership when a sibling joins the company.
- And, if time permits, stock gifting methods that each family uses.

To get more information about the group, contact Sue Schierstedt at 424-2257.

Best Practices Group

Ten members attended the Best Practices meeting at Bassett Mechanical on June 12th. Phil Florek of H.G. Weber began the discussion of cash management practices. The discussion continued as the members identified their practices and raised questions about implementation and policies.

Thanks to Kim Bassett-Heitzmann and Bill Bassett for being our hosts, to Phil for getting the discussion going, and to everyone who shared their practices and philosophies.

The next meeting of the group will be August 8, 11 a.m. - 1 p.m. at UW Oshkosh. If you would like to participate in this group, please contact Sue Schierstedt, 424-2257. Reservations are required.

Reciprocity Agreement

The Forum has renewed its reciprocity agreement with the family business centers at UW-Madison and Marquette University. This agreement effectively triples the value of the Forum membership.

For information about our reciprocity program, visit our web site: <http://www.uwosh.edu/wfbf/> in the **Resources** link.

Program Calendar 2000-2001

Date/Time	Topic/Event	Presenter(s)
July 11 1 - 4 pm	<i>Successors Group</i>	Darcy Lemmers, Zander Press—host
Aug 8 11 am—1 pm	<i>Best Practices Group</i>	College of Business, UW Oshkosh
Aug 29 1 - 4 pm	<i>Successors Group</i>	Meyer family, Meyer Services—hosts
Sep 5 7—10 am	<i>Managing the Family Business and the Business Family</i>	Mike Ariens Ariens Company
Sep	<i>Successors Group</i>	Dave Morton, Morton Drug Co.—host
Oct 23 7 - noon	<i>Strengthening & Organizing the Family’s Role</i>	Nancy Waichler, Follett Corporation & Family Business Consulting Group
Dec 5 3 - 6 pm	<i>15 Keys to Keeping Your Assets Safe</i>	Sponsors
	<i>2002</i>	
Jan 31 3 - 6 pm	<i>Compensation Packages & Retention</i>	Lori Phillippi, Badger Mining Corporation
Mar 19 7 - noon	<i>Developing Successors</i>	Drew Mendoza, Family Business Consulting Group
May 3 - 11	<i>Exit Strategies — International Workshop in Greece</i>	
TBA	<i>6th Annual Dinner</i>	
TBA	<i>3rd Annual Golf Outing & Dinner</i>	

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The following sponsor-members contribute their time, professional services, and money to keep the Forum at the forefront of family business forums, worldwide:



Affinity Health System is an integrated regional health network that offers a broad array of health care services to more than a dozen northeast Wisconsin communities. As a mission-driven organization, Affinity promotes the health and well-being of local communities through the sponsorship of a broad array of community-focused, charity-based programs and services.



BCI Group, established in 1978, offers full-service consulting, actuarial, and recordkeeping services for all types of qualified and non-qualified benefit plans.



First National Bank — Fox Valley has a competitive advantage of developing strong, close customer relationships, especially in the niche of family-owned businesses. Thanks to a dedicated staff, FNB has completed its 113th year of providing financial services to the people and businesses of the Fox Valley with locations in Menasha, Neenah and Oshkosh.



Grant Thornton LLP is an international accounting and management consulting firm with offices throughout the United States and in over 97 countries worldwide. Their mission is to be the leading global organization creating, enhancing, and preserving wealth for entrepreneurial companies and the people who own and run them. Grant Thornton accomplishes this by providing business, tax and financial services that deliver measurable value to their clients.



Marketlink Inc. is a full-service marketing communications, public relations, e-marketing and advertising agency based in the Fox Valley. Marketlink not only provides support for promotion and design, but also manages ongoing marketing programs, advertising placement, event coordination, web site design/maintenance, and public relations campaigns.



McCarty Curry Wydeven Peeters & Haak LLP has been serving the legal needs of large and small family businesses in northeast Wisconsin since 1949. The firm's services include all aspects of business and corporate law, real estate, complex estate planning, commercial and personal litigation, as well as general practice.



Retained Earnings Company/MassMutual—The Blue Chip Company has recognized excellence in providing family owned businesses with the product tools that allow for the confident construction of estate and business succession plans. The firm brings experience, education, empathy and motivation to clients' quest for financial growth and security. Retained Earnings is acknowledged as the premier provider of pension and investment products, life and health insurances.



University of Wisconsin Oshkosh, College of Business Administration provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. The faculty and staff are professionals dedicated to being quality teachers, accessible to students; furthering knowledge through research; and serving as valuable resources to the University and community. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.
