Developing Effective and Responsible Family Shareholders

Presented by

Drew Mendoza
Family Business Consulting Group

March 8, 2005
1:00—5:00 pm
Butte des Morts Country Club
Appleton, Wisconsin

Normal business-owning family members have misunderstandings. Having varying expectations of one another and of the business is often the driving force behind these squabbles which can accelerate into full-blown squalls.

Join along with other family business owners and their managers as Drew Mendoza presents this workshop which will provide answers and insights into developing effective and responsible family shareholders.

During this workshop, Drew will answer and address these topics:

• What do we mean by “effective and responsible family shareholders”?
• What are appropriate behaviors for family shareholders when wearing their ownership hats?
• Are these experiences we can create for our children to instill these concepts at a young age?
• Do the rules differ for family and family shareholders who work in the business from those who do not?

Drew will...

• challenge your ideas about what it means to be an owner.
• propose that the family’s harmony will be enhanced with a common nomenclature.
• challenge you to explore the philosophical components of the firm’s ownership you and your family members can strive toward.

You will have an opportunity to talk with other owners as well as with Drew about shareholder issues relevant to your business.

Drew Mendoza is the managing principal of The Family Business Consulting Group, Inc. He was the founding director of the Loyola University Chicago Family Business Center. He specializes in working with adult sibling and cousin teams of family business owners/managers and larger shareholder groups. A public speaker and columnist on family business matters, he has appeared on national and local Chicago television networks; has been quoted in the Chicago Tribune and Crain’s Chicago Business; and is published in the Family Business Review, Family Business Advisor, and Family Business Magazine. He is co-author of the book Making Sibling Teams Work: The Next Generation.

He has presented both internationally and throughout the United States to universities, trade associations, and professional service organizations. Mr. Mendoza provided expert testimony to the U.S. Senate Finance Committee on the impact of estate and gift taxes on family firms.

Mendoza came to the field of family business having worked as a real estate economist developing strategic planning and expansion strategies for businesses ranging from retail and manufacturing to the restaurant industry.

Drew lives in Chicago with his wife, Eloise, and their daughter.
Agenda
1:00—5:00 pm

12:45 — Registration & Networking
1:00 — Announcements & Introductions
1:15 — Developing Effective & Responsible Family Shareholders
4:45 — Closing Remarks

The Wisconsin Family Business Forum is a partnership—family business owners, family members, non-family managers, business professionals, and academic consultants. We are a community that shares values, experiences, and commitment to family business. Coming together as partners, we explore the challenges and rewards of family enterprise and to grow in our knowledge, skills, and experience.

Members

Family business members are encouraged to bring family members, whether or not they are actively employed in the business, and key non-family managers. This is an excellent program that will be valuable to everyone on your management team and in your family.

Prospective Members

Family business owners who are interested in attending this program and learning more about the Forum and have not previously attended a Forum program may participate in one program as a guest. We believe that once you have joined us for a program and discovered the value of the Forum, you will apply for membership for your business.

The guest fee for this program is $175 per person. For details about membership or about the program, contact Sue Schierstedt, director, (920) 424-2257, or e-mail schierss@uwosh.edu.

Registration

Please register for this program no later than March 1, 2005. Registration is done on-line at http://www.uwosh.edu/programs. Or, you may register by contacting Ann Stein at (920) 424-1541 (phone), or via e-mail - steina@uwosh.edu.

For More Information

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