



ROTHMAN INSTITUTE  
OF ENTREPRENEURIAL STUDIES

# Family Business Forum

## 2009 Program

**Your Family — Your Biggest Asset  
in These Challenging Times**

### **Back to Basics: Learning to Build on the Uniqueness of Families Who Share a Family Enterprise**

February 26, 2009 • 8:30–11:30 a.m.

**Fredda Herz Brown**, Relative Solutions Family Business Consulting Group

Using an innovative presentation and interactive case study, family business consultant, Fredda Herz Brown, will illuminate the basics for understanding families who share some kind of asset through ownership and/or management. Looking at the multigenerational influence of attitudes and relationships to issues such as money, leadership authority and control and how they impact how a family handles decision making and transitions will be a focus of this session. Members will come away with a new understanding of the issues and impact of generational differences and relationships as well as those related to gender.

### **Reducing the Cost of Succession in Today's Society**

April 2, 2009 • 8:30–10:30 a.m.

**Andrew Bluestone**, Selective Benefits Group; **Ed Ahart**, Schenck, Price, Smith & King LLP; and **Jeffrey Jaskol**, The Jaskol Group

This program, given by forum sponsors Andrew Bluestone, Ed Ahart and Jeffrey Jaskol will focus on all of the “tried and true” methods of business succession and transition that are typically reviewed by business owners and will illustrate how the current economy presents opportunities to reduce costs going forward. Issues to be discussed include current estate tax law and developments, business valuation, transfer opportunities in this low interest-rate environment, new life insurance opportunities and when it is “too soon” or “too late” to give a gift. Attendees will come away with the knowledge necessary to determine what their optimal “next steps” need to be.

### **The New Consumerism — Consumer-driven Health Care**

May 14, 2009 • 8:30–10:30 a.m.

**Tom Cioffi** and **Pat Basilo**, Compensation Solutions PEO

Moving from a traditional health benefit plan with copayments or low deductibles to a consumer-driven health care plan is a significant benefit change, but it is one that can result in better management of your increasing health care costs. The most successful benefit changes are those that provide “plan design options” and encourage employees to change their health care-buying practices through education and information, choice and advanced technology.

### **Key Tactics: Reinvigorating and Recharging Your Business**

September 10, 2009 • 8:30–10:30 a.m.

**Alan Wink**, Amper, Politziner & Mattia; **Robert Lemaire**, Sun National Bank

Complacency is not an effective way to ensure your business goals are being met, especially in the light of the current economic environment. Using an innovative presentation and interactive panel of companies who’ve “walked the talk,” family-business experts, Alan Wink and Robert Lemaire will provide effective strategies that any closely held firm can use to stay on the path of positive growth. Topics to be examined include revenue growth strategies, methods to engage and “care for” employees, leveraging your balance sheet and taking advantage of opportunities to acquire weaker firms.

### **The Next Generation: Its Eight Biggest Challenges Updated Session**

October 19, 2009 • 8:30–11:30 a.m.

**Greg McCann**, CPA, JD, Family Enterprise Center, Stetson University

Is it your intention for the family firm to continue ownership with the next generation? If so, have the senior and junior generations crafted a vision to get there? Based on a holistic approach and more than a decade of working with next-generation successors, Gregg McCann will address the eight most significant challenges facing the next generation of a business-owning family. Each of the eight challenges will be discussed, along with examples, consequences of ignoring them and strategies to overcome them.

### **10 Great Ideas to Make You and Your Family More Successful in This Very Challenging Economy**

November 17, 2009 • 8:30–10:30 a.m.

**Leonard Green**, The Green Group

Utilizing an interactive discussion format, Len Green will focus on “proven methods” to creatively grow and be more profitable. Green “guarantees” one of the 10 great ideas can make you more successful! He is an entrepreneur and faculty member at FDU and Babson College, who has been on CNBC and other TV shows. His experiences also include working with his family business and more than hundreds of other family businesses.

THE LEADER IN GLOBAL EDUCATION



FAIRLEIGH  
DICKINSON  
UNIVERSITY

### **For More Information**

If you are interested in attending an upcoming session as our guest or learn more about the Forum, please contact us at 973-443-8880. More about the Institute at [www.fdu.edu/rothman](http://www.fdu.edu/rothman).