

“Understand the barriers against the continuity of family business and prepare for effective transfer of wealth to the next generation”

Building and Sustaining Legacy of Oikos: Best Practices for Families in Business.

THE ASPEN FAMILY BUSINESS GROUP
22 - 24 SEPTEMBER 2017, THESSALONIKI

You are invited to join Joe Paul, Leslie Dashew, Burak Kocer and Donnel Nunes together with other international expert speakers for a weekend of learning based on their more than 100 years of experience working with family-owned businesses and their advisors.

In a relaxed setting, participants will have the opportunity to discuss the concerns they may have about the future of their family business and learn effective approaches to create a solid governance profile. Select the level of mastery you would like to attain in relation to your family business and discuss with the members of the Aspen Family Business Group toward that end.

ABOUT THE ASPEN FAMILY BUSINESS GROUP

The Aspen Family Business Group is the premier industry thought leadership and consulting resource for families in business and of wealth. We are an international consulting resource, helping families successfully navigate change to achieve harmony and prosperity.

The Aspen Family Business Group was founded in 1987 to develop and disseminate knowledge about families in business together. This foundation of collectively creating expertise led the Aspen Group to be known as the thought leader in the emerging field of family business consulting. We have served not only as consultants to families, but also as mentors to advisors in the field to assure that families receive the best possible advice from all disciplines. Our work has been recognized with many honors and awards by the Family Firm Institute.

Our expertise lies in our understanding of the complex dynamics of families who share businesses and other assets. Through our ability to foster a shared vision and build trust in the family, we guide our clients through a process of addressing challenges and building sustainability. We combine a professional approach to multigenerational planning with attention to the delicate issues that arise in families of wealth and families in business. We provide safe environments and tools for families and their advisors to assure effectiveness in succession planning and other transitions.



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In addition to our practice in the US, we have worked with clients and professionals in many corners of the globe including Great Britain, India, Turkey, Kuwait, Saudi Arabia, Dubai, Guam, Nepal, Mexico, Columbia, Brazil, Australia and Canada.

We invite you to learn more about us at www.aspenfamilybusiness.com

The presenters will engage participants in a program covering practical and in-depth guidance on the following concepts:

KEY CONCEPTS

- Shared values
- 7 components of succession
- Differentiation of systems and roles
- Board of directors
- Family council
- Mentoring the next generation
- Estate planning

PROGRAM*

September 22, 2017

Registration

Synopsis of the Workshop

- Challenges of family business survival
- Four cornerstones for successful transition
- Who will undertake what

Genogram of Ancient Gods: Lessons from Greek Mythology for Families in Business

Role Playing

Shared Vision and Values

- Values that help families navigate across generations
- Individual values and differentiation
- Exploring shared values
- Differentiated family policies that reflect shared values

Estate Planning Strategies: Effective Transfer of Wealth.



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September 23, 2017

Mentoring the Next Generation

- Historical origin of mentoring: An ancient practice
- Case study
- Family Business model for mentoring: building a community of mentors
- Roles for family and non-family mentors
- Building on strengths
- Avoiding pitfalls

Best Practices for Family Boards

- Differentiation of roles owner v. manager
- The role of the family council
- Board composition and effectiveness
- Long term planning for boards of directors

Group Discussion: Case Study on Family Boards

Knowledge Management in Family Firms

- Assessment of blocks in the flow of knowledge
- Typology of family business owners

Succession: The Seven Challenges

- Ownership
- Management
- Authority
- Relationships
- Knowledge
- Values
- Leadership

Group Discussion: Case Study on Succession

Overcoming the Barriers in Change



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SPEAKERS



Leslie Dashew has combined her background in organizational development and family therapy to specialize in consultation to family businesses and families of wealth, as well as other organizations, private and public. She has been in practice for over 40 years and while located in Scottsdale, Arizona, she serves family businesses all over the world.

In 2010 The Family Firm Institute awarded Leslie the “Richard Beckhard Award” which is the most prestigious award in this field. It recognizes contributions to the knowledge and practice of advising family businesses.

Leslie Dashew
Scottsdale, Arizona

Joe began his career as a Staff Psychologist in a mental health clinic in 1978 and went into private practice as a Family Therapist in 1980. He wrote the licensing law for Marriage and Family Therapy in Oregon and was the first to be licensed in 1990. In 1991 he began to specialize in Family Business Consulting and, in 1994, he was invited to join the prestigious Aspen Family Business Group.

In 2011, The Family Firm Institute honored Joe with the Interdisciplinary Achievement Award for “outstanding achievement in interdisciplinary services to business families.”



Joe Paul
Portland, Oregon



Burak is an associate with The Aspen Family Business Group since 2012. He completed his MBA at Ball State University Miller College of Business, Indiana, US, in 2000. He received his PhD from Istanbul University in 2005. He assisted a number of family businesses in developing their family constitutions, shareholder agreements and governance models. Burak is also advising publicly listed companies on governance related matters. Since 2012 Burak is an independent board member at Bosch Fren, a Robert Bosch Group subsidiary listed in Istanbul and Federal-Mogul Izmit, a Turkish American JV listed in Istanbul. Burak speaks English, German and Greek in addition to native Turkish.

Burak Koçer
İstanbul

Donnel is a behavior and educational specialist. He brings more than 15 years of experience in family therapy and education to his work with families in business. His focus is assisting families to build and nurture a culture of shared learning, through effective communication, that promotes the skillful exchange of knowledge between generations. He is also a PhD candidate at the University of Hawaii, Manoa where he is conducting groundbreaking research on familial mentoring (mentoring between family members). Donnel is an independent regional associate of Coaching and Mentoring International (CMI), a European based consultancy that specializes in mentoring program development, implementation, and training.

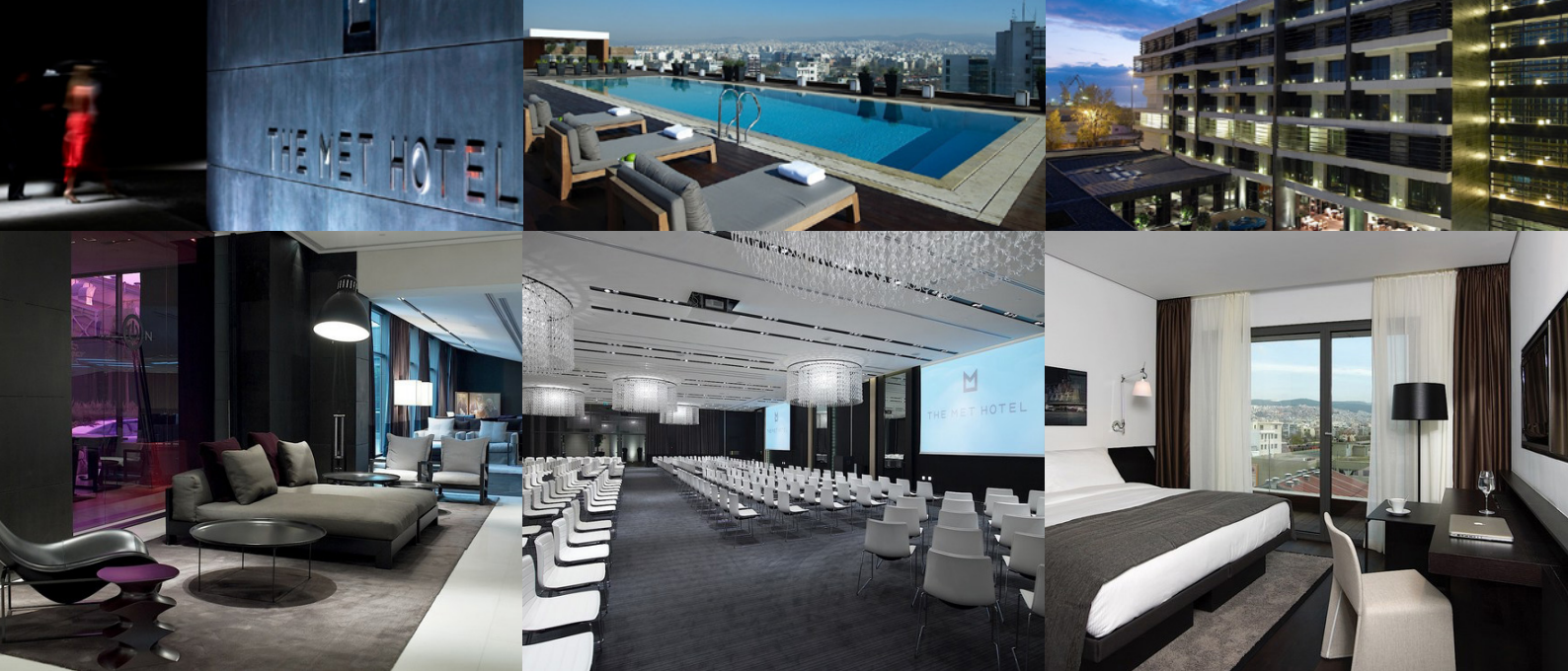


Donnel Nunes
Kailua, Hawaii



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LOGISTICS

The programme will be held in Thessaloniki, Greece and will be limited to 70 participants.

VENUE & ACCOMMODATION

THE 5* MET HOTEL will host this programme. We have carefully selected this hotel among other options for its location, aesthetics and state of the art facilities. You will enjoy the outstanding comfort and sophisticated amenities along with a world of class art collection on display. www.chandris.gr/themetthessaloniki

REGISTRATION & RESERVATIONS

An online Registration System will soon be available for your reservations.

Early Package Delegate Rate: 980 euro per delegate, which includes:

- Participation to the programme
- Programme folder & materials
- 4 coffee breaks & 2 light lunches
- Airport transfers
- A city tour followed by a dinner, wine included on Friday
- A visit to a winery followed by winetasting & dinner on Saturday
- 3-night accommodation at the Met Hotel including breakfast, in 22 out 24 September
- VAT and all taxes

Early Rates apply for registration until 30 June 2017. From 1 July 2017, a Late Registration Supplement of 50 euro will be applicable

Accompanying persons are very welcome to join you; the cost of participation is 180 euro per person, which includes

- Airport transfers
- 1 City Tour followed by a Dinner, wine included
- 1 Visit to a winery followed by winetasting & dinner
- 3 night double room accommodation supplement at the Met Hotel including breakfast, in 22 out 24 September
- VAT and all taxes



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OPTIONAL PROGRAMME

On Sunday morning 24 September, from 8.30-12.30 we have planned an optional programme to the exquisite museum of Vergina, to visit the royal Tombs of King Philip II, father of Alexander the Great. Vergina testifies the culture of the Macedonian Kingdom and is considered as one of the greatest archaeological finds of the century!. Rich and impressive artifacts were unearthed and can be viewed there along with the tombs themselves and the amazing frescoes, rare samples of painting from antiquity. The programme costs 45 euro per person and includes the transfer on a luxurious coach, the official guide in English, museum entrance, a refreshment and all taxes. Reservation can be made on the online registration system.



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THESSALONIKI

Live, Learn and Love Thessaloniki

Thessaloniki is a very popular destination. You will certainly enjoy a pleasant and interesting stay in the city. People are friendly and happy to help with any questions. The atmosphere is unique during the day in the commercial and shopping centre, but especially during the evening, in the wide variety of bars, restaurants and theatres for entertainment. Thessaloniki is renowned for its unique location, along the Thermaikos Gulf, its sunsets, its long history, its monuments and museums as well as its distinguished cuisine.

Named after the half-sister of Alexander the Great, Thessaloniki was founded under Cassander, in 315BC. It was later made the capital of the Roman province of Macedonia after the victory of the Romans over the Macedonians, in 168 BC (battle of Pydna). It also played an important role in early Christianity, as one of the first cities in Europe having a Christian community, after the visit of Apostle Paul. Its position along the Via Egnatia (a road connecting Rome to Byzantium), as well as its excellent harbor, allowed the city to prosper during the later Roman and Byzantine Empire. It continued to be a major port into the modern era and became part of Greece in 1913, after the Treaty of Bucharest. In the beginning of the 20th century, Thessaloniki was a great city, presenting a mosaic of languages, ethnicities and religions, Greeks, Turks, Jews, Armenians, Serbians and Bulgarians, Arvanites and western Europeans. The three main nationalities of the city, Jews, Ottomans and Greeks cohabitated harmoniously, although their relations were limited to the bare essentials. There was a significant tolerance of followers of all religions which made this cohabitation possible.



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