



## BREAKOUT SESSION

### Monday, February 11, 2019

Breakout Session	Session Title	Session Participants	Session Description
Breakout Session 1	Are Two Heads Really Better Than One? Co-Leading a family business.	<b>Curt Rocca</b> , Managing Partner, DCA Partners <b>Robert “Bob” Clark</b> , President of Operations/Co-Owner, Clark Pacific <b>Don Clark</b> , President of Business Development/Co-Owner, Clark Pacific	Bob and Don Clark will discuss their efforts to co-lead their family business, Clark Pacific. They will discuss best practices on working closely with a sibling, how to divide responsibilities, and how they approach difficult conversations and major decisions.
Breakout Session 2	Talent Development Strategies for 21st Century Leaders	<b>Shaunna Jones</b> , Talent Advisor - KCoe People	Engaging the next generation of talent is a challenge every business is facing today! In this interactive session, attendees will learn how to create a high-performance culture using progressive talent systems. Participants can expect to have their current mindsets about leadership development and traditional performance management challenged, and walk away with new strategies to increase employee loyalty and engagement.
Breakout Session 3	Managing Family Dynamics When a Family Member Wants to Leave or Sell	<b>Eric Smith</b> , Senior Business Transition Strategist – California and Nevada Region Senior Vice President, Wells Fargo Private Bank <b>Suzanne Mansell</b> , Family Dynamics Consultant, Wells Fargo Private Bank	A family member wants out - now what? Eventually, a family member will want to leave the business or sell their shares. Do you have the right family communication and governance policies in place?





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**BREAKOUT SESSION**  
**Tuesday, February 12, 2019**

<b>Breakout Session</b>	<b>Session Title</b>	<b>Session Participants</b>	<b>Session Description</b>
<b>Breakout Session 4</b>	When Two Rights Make a Wrong; Balancing Ethics Between Business and Family	<b>Kim Silvers</b> , President, Silvers HR, LLC <b>Larry Mandelberg</b> , Mandelberg Consulting	Using a case study and introducing a little-used decision-making tool, you'll experience a real-world scenario that explores our most difficult decision-making responsibilities; the ones that cross the lines between family and business, the challenging and often painful issues that bring dramatic risks in today's world where ethics, social media, and instant communication intersect; where subjective decision making can cause irreparable harm to business and family.
<b>Breakout Session 5</b>	Help, Hassle or Hindrance - The Role of the Board of Directors In Family Businesses	<b>Don Yee</b> , Independent Board Director, Blue Diamond Growers, OC Communications, National Association of Board Directors <b>Dave Luchetti</b> , CEO, Pacific Coast Building Products, Inc. <b>Jeffrey Walker</b> , Chairman of the Board and Chief Financial Officer, Larry Walker Associates <b>Timothy Schultz</b> , VP Research and Development, Lundberg Family Farms, Board Director of The Capital Region Family Business Center	This session will explore how the best family business boards function and how they add the most benefit to the success of the family business. It will include the latest key research findings about family boards and feature a panel discussion and interchange with current family business board directors on what works and what doesn't in the real world.



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<b>Breakout Session 6</b>	I'm not my Mom or Dad, but I sure as hell can still lead! Generational Transitions	<b>Steve Bender</b> , CEO, Warren G Bender Co. <b>Maggie Bender-Johnson</b> , President, Warren G. Bender Co. <b>Eric Burger</b> , Vice President Administrative Services, Burger Rehabilitation <b>Michele Amaral</b> , President, CFO, Dick James and Associates	What is it like to take over the helm of your business from your parent? What are the best ways to prepare for this epic transition? This three person panel of next generation leaders will tell stories of transitioning from working for their parents to leading their organizations. You will hear how they develop and apply their own leadership styles as well and the challenges that come with becoming the next leader. If you are preparing to hand over leadership of your business to the next generation, or if you are getting ready to take over your business from your parents, this breakout will give you insight into the process and leave you with the right questions to ask.
<b>Breakout Session 7</b>	Conflict: The Frenemy of Every Family Business	<b>Ken Pense</b> , Principal, Leadership One <b>Marcus Bigelow</b> , Principal, Leadership One <b>Susan Walker</b> , COO, Larry Walker and Assoc. <b>Sharon Love</b> , Co-CEO, Incredible Pets <b>Laura Rogers</b> , Community Marketing and Sales Manager, San Francisco Bay Coffee	Conflict is a natural part of every family owned business including yours. You will hear stories from three family business and walk away with two tools for application to your own business.
<b>Breakout Session 8</b>	Trump Tax Law: An Opportunity that May Not Last	<b>Kelly Brothers</b> , Financial Advisor, Partner Genovese Burford & Brothers <b>Mark Huffman</b> , Financial Advisor, Genovese Burford & Brothers <b>Bridget Sanders</b> , CFO, WHAL Properties, LP <b>Cathy Aronson</b> , Manager, WHAL Properties, LP <b>Laurel Dein</b> , Attorney, HMS Law Group	With the changes in tax law, now is an opportune time to plan the transition of your family's assets to the succeeding generations. Genovese Burford & Brothers and the Anderson Family will share thoughts and real-life examples of strategies in the Trump tax bill era.
<b>Breakout Session 9</b>	Fireside Chat with Andy Unanue	<b>Andy Unanue</b> , Managing Partner AUA Private Equity Partners <b>Jan Rosati</b> , Partner, MGO	Attendees will have the opportunity to ask questions during this fireside chat with Andy Unanue.



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