

# Upstate New York Family Business Day Symposium

## Do you have family business clients you want to see flourish in the next generation?

Even though nearly 70% of family businesses would like to pass their business on to the next generation, only 30% will actually be successful at transitioning to the next generation.

That's why we are inviting you AND YOUR CLIENTS to attend the 2019 Upstate NY Family Business Day Symposium

Join us this September 24, 2019 so we can help your family business beat the statistics!  
RIT Inn and Conference Center 5257 West Henrietta Rd., Henrietta, NY 14467

A block of guest rooms is being held Call 585-359-1800 or register online at [www.rit.edu/ritinn](http://www.rit.edu/ritinn) (code: 190924RIVE)

## Featured Speakers ...*See more details on the other side*



**Pierre duPont**, A descendant of the founder of one of the Dow Jones original twelve and its longest-lived company, and a part-owner of a large family-held retail chain, hosts an interactive **A "Fireside Chat"** prior to the conclusion of the program.



### Jeff Savlov, Founder & Family Business Consultant



Don't miss Jeff's Presentation entitled,  
**What your family business can learn from the rock band Metallica**

### Cathy Carroll, Founder & Family Leadership Coach



Reserve your space for Carroll's keynote  
**Greater Profits Through Greater Performance: How to develop the next generation of leaders in the family business**



The New York Times

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The Upstate New York Family Business Day Symposium is presented by  
The Rivers Organization, 312 West Commercial Street, East Rochester, NY 14445  
For more information and registration contact us at  
**585-586-6906 or [familybusiness@riversorg.com](mailto:familybusiness@riversorg.com)**

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Single Attendee \$125    3 Attendees \$350    6 Attendees \$675

For more information and Registration visit [www.unyfamilybusiness.com](http://www.unyfamilybusiness.com)

## Presentation Descriptions

**Jeff Savlov** is the Founder of Blum & Savlov, LLP. He has worked with business families for over 25 years and describes dynamic tension as “easy yet difficult” (easy to understand, difficult to harness productively). His two presentations are:

### ***Cracking the Family Business Code***

At its best, a family business brings family closer together while creating economic opportunity for family and community. The dark side can be damaged family relationships, unmotivated and spoiled children and financial ruin. Understanding the common and intense dynamics of combining family and business is a key element to managing successfully across generations. This workshop will provide an overview of the dynamic tensions all business families face with strong suggestions for managing them.

### ***What Your Family Business Can Learn From the Rock Band Metallica***

This highly interactive and creative workshop features clips from the movie “Some Kind of Monster”, a documentary about the heavy-metal rock band Metallica. The band hired a consultant to work with them during a period of heavy conflict while trying to make an album. It is chock full of great examples of the challenges business families face (or are blind to). The band itself, while not blood related, is essentially a family in many ways and overall the film gives great fodder for discussion about family business dynamics for families and the professionals advising them.

**Cathy Carroll** is founder and President of Legacy Onward, Inc., a leadership coaching firm helping family business leaders thrive.

### ***Greater Profits Through Greater Performance: How to Develop the Next Generation of Leaders in the Family Business***

Join Cathy on a leadership development odyssey for next generation leaders. This presentation has nothing to do with education, training and job rotations. She will talk about the journey of development that you don’t learn in the classroom or on the job, yet is integral to leadership development in a family business: harnessing emotion, integrating feedback and leveraging paradox. These critical skills develop from the inside, take time to mature, and are essential to building resilient individuals, families and family businesses.

**Michael Palumbos**, is the Principal of Family Wealth & Legacy, a second generation financial advisory firm based in Rochester,

### ***The Four Decisions of Business Growth and How Family Businesses Can Leverage Them***

In any business, no matter what challenges you face, four critical decisions impact your ability to scale up growth. Family business can either leverage these decisions or be hindered by them. During this seminar we will introduce the four decisions and help you to determine how they are impacting the family business. The four decisions will help you to:

- Outline the accountabilities and metrics to get your people doing the right things
- Get family and non-family members on the same page with your business strategy for top-line growth
- Discover the habits that can give your leadership team back 90% of their time to focus on market-facing activities
- Identify concrete ways to increase operating cash flow

**Pierre duPont**, As a descendant of the founder of one of the Dow Jones original twelve and its longest-lived company, and as a part-owner of a large family-held retail chain, Pierre has experienced the opportunities and obstacles of family business ownership, both current and those that develop across generations. Join him as he leads **A “Fireside Chat”** group discussion in which he will comment on the following three topics:

Considerations for *if* and *how* to pass the family business to the next generation

What you may want to do versus what you can do for your descendants

Family communications and governance: how you can help family harmony in the future



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**Tuesday, September 24, 2019**

RIT Inn & Conference Center ♦ 5257 West Henrietta Road ♦ Henrietta NY 14467

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