

## **3rd Annual Family and Closely Held Business Summit**

Co-sponsored Event  
October 26, 2017 | 12:00-4:30 p.m.  
Seattle, WA

Garvey Schubert Barer, [Bader Martin, PS](#), [BMO Capital Markets](#), [Pillar International Insurance Advisors](#) and [Key Private Bank](#) are co-hosting the 3rd Annual Family and Closely Held Business Summit on Thursday, October 26, 2017 at the [Bell Harbor International Conference Center](#) in Seattle, WA. It will address the pressing issues that will impact family and closely held businesses now and in the future.

### **WHO SHOULD ATTEND**

Executives, owners and managers of family and closely held businesses.

### **KEYNOTES AND PANELS**

Key Private Bank's Chief Investment Officer, [George Mateyo](#), will share insights on current investment trends

[Jim Warjone](#), former CEO of fifth-generation, family-owned Port Blakely Companies, discussing succession planning challenges

Two roundtable sessions: the first, featuring advisors from law, accounting, investment banking, insurance and wealth management showcasing a cohesive strategy to tackle typical family business issues; the second, featuring regional executives for a 360° view of business succession planning and exit strategy

### **ATTENDEES WILL BE ABLE TO**

Leave the program equipped with practical, actionable strategies for addressing challenges facing family and closely held businesses.

**AGENDA**

11:30 a.m. - 12:00 p.m. - **Registration**

12:00 - 12:30 p.m. - **Lunch**

12:30 - 1:15 p.m. - **Keynote – *What to Expect When You’re Investing*** | [George K. Mateyo](#) | Key Private Bank

1:15 - 1:30 p.m. - **Coffee Break**

1:30 - 2:30 p.m. - **Advisors Roundtable**

[Harold E. Snow, Jr.](#), Owner | Garvey Schubert Barer

[David Stiefel](#), Managing Principal | Director of Family Business Services | Bader Martin, PS

[Cameron M. Hewes](#), Managing Director | Mergers & Acquisitions | BMO Capital Markets

[Rodney A. Bench](#), Principal | Pillar International Insurance Advisors

[Francis Brown](#), Wealth Specialist | Senior Vice President | Key Private Bank

2:30 - 2:45 p.m. - **Coffee Break**

2:45 - 3:15 p.m. - **Keynote – *Successful Successions*** | [Jim Warjone](#) | Engel & Völkers (former CEO of Port Blakely Companies)

3:15 - 3:30 p.m. - **Break**

3:30 - 4:30 p.m. - **Family Business Executive Panel**

Shaiza Damji, Principal and Managing Director | 360° Hotel Group

Geoff Larson, President and Co-Founder | Alaskan Brewing Company

Foss Miller, Founder | Pacific Research Labs

4:30 - 7:00 p.m. - **Cocktail Reception**