

Family & Closely Held Business Summit 2018

Event

BizTimes Media; Milwaukee, WI
June 14, 2018

This forum will provide an extensive overview on how to navigate many of the complex issues related to growing a successful and sustainable family and closely held business. Attendees will learn from family business owners on a variety of topics ranging from trust, transparency, legacy, and leadership.

The keynote speaker for this year's summit will be Deb Houden, Ph.D., Senior Consultant of The Family Business Consulting Group. Following the speaker will be an informative panel discussion featuring family and closely-held business owners including: Louie Gentine, CEO of Sargento Foods and Tom Faley, Author and Communications Manager of Sargento Foods. The summit will conclude with attendees having the opportunity to select and participate in three out of 14 roundtable discussions covering the core themes gathered from the program.

During the program, there will be the following roundtable discussions:

- **Preserving the Family Legacy Through Estate Planning**, Jacqueline L. Messler
Jackie will provide a first-hand look at the most effective estate planning techniques used by family business owners to ensure that the legacy of your business lives on as you intend. Guests will be provided with perspective on key estate planning documents for use, critical language for inclusion relative to effectively integrating the business into the estate plan and insights on best practices for buy-sell agreements. Ask questions. Glean implementable insights.
- **Communication and Company Culture—Workforce Issues**, Laurie E. Meyer
Join Davis & Kuelthau's Labor & Employment Team for the latest tips helping employers weave the fabric of their cultures into their workforce throughout the generations. Factors addressed will include: what NOT to say to your aging workforce relative to transitioning their skills to the next generation; tips for making retirement less frightening for those reluctant to take the leap; how to maintain good, young talent while retaining an older workforce; and training management on what "Me Too" means.

PROFESSIONALS

Jacqueline L. Messler
Partner

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