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Guest,

Welcome to:

Creating a Legacy Family Business

Presented by
Lighthouse Consulting Services, LLC



Featured Guest:

Ken Ude, Director
USC Marshall Family
Business Program
323-365-3787

ken.ude@gmail.com



Host:

Dana Borowka, MA
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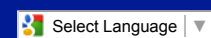
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Discussion Outline

- The Importance of Family-Owned Businesses
- The USC Marshall Family Business Program
- Managing Your Hat Collection
- 4 Phases of a Successful Family-Owned Business
- Key Issues in Creating a Successful, Multi-Generational Family-Owned Businesses

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Importance of Family Businesses

- 90% of all businesses in the USA are family-owned businesses
- Family-owned businesses represent 60% of the nation's jobs and 65% of the GDP
- Mortality rate is high for family-owned businesses
 - 40% pass to Gen 2, then falls to ~ 12% to Gen 3 and 4% beyond

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USC Marshall Family Business Program

- Mission:
 - To Create and Preserve Wealth by Increasing the Professionalism of the Business and the Effectiveness of the Family
- Guiding Principles:
 - Create a safe environment for sharing and learning
 - Provide world-class, and practical, resources
- Launching next month
 - www.USCFamilyBusiness.com

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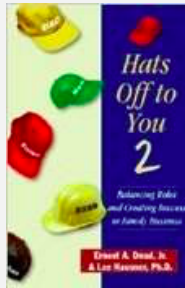


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Foundation for the Discussion

- Hats Off to You ~ 2
 - By Lee Hausner, PhD. And Ernie Doud
- There are ~ 13 hats in every family business
- You need to know what hat you're wearing
- 'No Hat = No Vote'



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The Family Business Hat Collection

Business Hats

- Founder
- Owner
- CEO
- Manager
- Non-management employee
- Director

Family Hats

- Dad
- Mom
- Spouse
- Son or Daughter
- Sibling
- In-Law
- Aunt or Uncle
- Cousin

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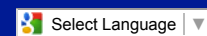
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Each Hat Has a Role

- . Rights
 - That come with each hat
- . Responsibility
 - Associated with wearing the hat
- . Accountability
 - That comes with the hat
- . **No Hat = No Vote!**

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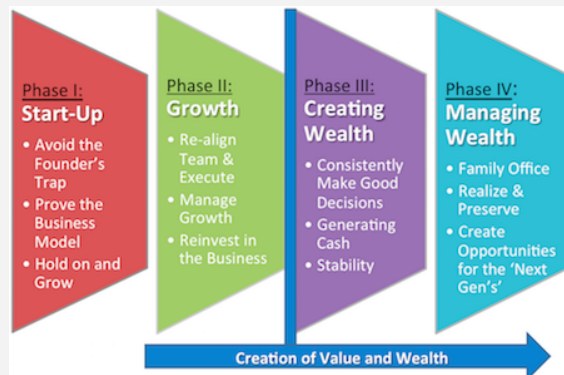
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Phases of Growth of a Successful Multi-

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4 Phases of Business Growth

- Start Up
 - Prove the business model and void the founder's trap
- Growth
 - Re-align the team, grow and reinvest in the business
- Creating Wealth
 - Consistently make good decisions and generate cash
- Managing Wealth
 - Realize and preserve wealth, create opportunities for the next generation

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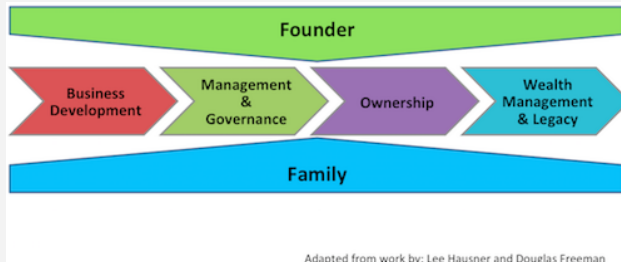
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Understanding the Challenges in Creating a Successful Multi-Generational Family Business



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Understanding the Challenges

- Founder's Transition
- Family's Role
- Business Development and Evolution
- Management & Governance
- Ownership
- Wealth Management & Legacy

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The Founder's Evolving Role

- Start Up
 - The Founder is the 'Doer' and 'Initiator'
- Growth
 - Founder transitions to a 'Builder' and 'Student'
- Creating Wealth
 - Founder becomes the 'Manager' and 'Teacher'
- Managing Wealth
 - Founder as 'Mentor' and 'Door Opener'

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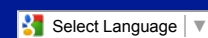
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Founder's Transition

- Realization that there is Life After Business
 - Preparing to transition
 - Preparing to retire
- Effective Transfer of Power
 - What role will you play?
- Financial Independence
 - Making sure that the Founder has enough

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Styles of Transfer of Power

- Monarchs
 - Rule with an iron fist, until forced out
- Generals
 - Leave grudgingly, and usually under pressure
- Governors
 - Serve for a limited term
- Ambassadors
 - The ideal ~ planning their departure

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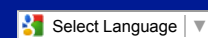
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Family's Role

- Goal:
 - To make your family's movements in search of balance purposeful rather than random!
- Value Differences
- Family Myths
- Communication Skills
- Manage Your Hat Collection
 - Know what hat you are wearing
 - No hat = No vote

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Business Development and Evolution

- . The Business Life Cycle
- . Operating Effectiveness and Efficiency
- . Strategic Thinking
- . Creating Sustainable Value
- . Execution of the Plan

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Management & Governance

- Who will run the business in the next generation?
- The Management Model Will Change
- Options and Opportunities
- Management Development

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Ownership Issues

- Who will control the business in the next generation?
- Challenge Assumptions
- 'Fair' May Not be 'Equal'
 - and 'equal' may not 'fair'
- Put It in Writing
 - Competent Owners + Informed Owners = Responsible Owners

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Wealth Management & Legacy

- Topics for another day:
 - Planning for an Orderly Transition
 - Getting wealth out of the business and to the family
 - Continuity
 - Liquidity
 - Legacy
- Key question: how much to give the kids ~ when ~ and how

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The Mobile Workforce – The Office of Tomorrow Today – How to Manage and Lead

Presented by
Lighthouse Consulting Services, LLC

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