



NextGen Family Business Workshop

June 25-26, 2019
Indianapolis, IN

Monday, June 24

Arrivals and Reception (5:00 – 7:00 pm | Studio Lounge)

Tuesday, June 25

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| 8:00 – 9:00 am | Breakfast |
| 9:00 – 10:00 am | Welcome, Overview, Group Introductions |
| 10:00 – 10:30 am | Break |
| 10:30 – 12:00 pm | Family Business 101 <ul style="list-style-type: none">• Overview of the key matters relating to family business complexity• Stages of family businesses• Making it personal: challenges and opportunities |
| 12:00 – 1:00 pm | Lunch |
| 1:00 – 2:30 pm | Communication and Conflict Resolution <ul style="list-style-type: none">• Overview of the communication issues specific to family-owned businesses• Conflict resolution ideas• Looking at the specific communication challenges of attendees |
| 2:30 – 3:00 pm | Break |
| 3:00 – 4:00 pm | Case Study |
| 4:00 – 5:00 pm | Personal Planning and Application – Individuals / Groups |
| 5:00 – 6:00 pm | Networking Reception (Cosmopolitan Ballroom Foyer) |

Wednesday, June 26

- 8:00 – 9:00 am Breakfast
- 9:00 – 10:30 am Responsible Ownership and Roles
- Ownership roles and responsibilities
 - Manager-owners
 - Non-operating owners
- 10:30 – 11:00 am Break
- 11:00 – 12:00 pm Governance
- Governance overview
 - Family Councils: Why? What do they do?
 - Board of Directors: Benefits, independent members
- 12:00 – 1:00 pm Lunch
- 1:00 – 2:30 pm Personal development and leadership
- Identifying the key areas for each attendee to invest in their development
 - Leadership, management skills, communication, etc.
 - Creating a personal action plan
- 2:30 – 3:00 pm Summary and Wrap-Up
- 3:00 pm Adjourn

SPEAKERS:

Nicole Bettinger

Nicole is a consultant with The Family Business Consulting Group specializing in communication, conflict resolution and training next-generation family business owners. Her experience includes facilitating family meetings, educating families and aligning ownership.

Prior to joining The Family Business Consulting Group, Nicole was the operations manager for the University of Wisconsin-Madison Family Business Center. Her work in programming helped the Center support family businesses through a variety of services including discussion forums, training programs and educational resources. In addition to consulting, Nicole is the HR Manager for a mid-sized family owned business, and also facilitates peer group meetings focused on the training of next generation family business leaders.

She has a personal passion and understanding of family business as her family owned a grocery store for 95 years before converting into a community operated co-operative.

Nicole's education includes a BA in History and International Studies from UW-Madison and an MBA from Roosevelt University in Chicago. She is a recent graduate of the Family Firm Institute Certificate program in Family Business Advising and is pursuing the Advanced Certificate in Family Business Advising. Nicole also has completed coursework in group facilitation and mediation through DePaul University.

Joshua Nacht, Ph.D.

Joshua Nacht is a consultant with The Family Business Consulting Group working with business families to create opportunities by focusing on effective governance, communication, and transitions. He is adept at working with multigenerational families to integrate diverse perspectives and create strong ownership groups by developing structured plans for continuity.

Drawing up a complementary mix of experiences from his roles as a consultant, steward, and scholar to family enterprises, Joshua connects well with people, and he highly values the collaborative relationships and trust that are built in his work with business families. He is an active family business owner and served as a married-in, third generation family member on the Board of Directors of the 75-year old Cleveland based Bird Technologies. In addition, he is a second-generation owner of a real estate development and management company in Edwards, Colorado.

Joshua is an active collaborator and thought leader in the field and is a co-author of numerous articles. He has presented on a range of issues including next-generation leadership development, having multiple roles, incorporating married-ins, and creating generational cohorts. His forthcoming book *Family Champions and Champion Families* explores the value of leadership in creating enduring business family success.

In 2015, he earned a Ph.D. in Organizational Systems with a focus on family-enterprise. Joshua's dissertation research, "The Role of the Family Champion" investigated leadership within the ownership group of business families and won the "Best Dissertation Award" from the Family Firm Institute in 2016. Prior to his doctorate, Joshua led wilderness skills trips and worked as a counselor with individuals and families.