

Family Business Education

A Basic Course of Family Business Study

WISCONSIN
FAMILY
BUSINESS
FORUM

Start
with a
solid
foundation



Family Business Education – A Basic Course of Family Business Study

This seven-day course of study will provide basic learning for the next generation of leaders regarding the dynamics of leading and maintaining a family business. Participants will earn a Certificate in Family Business Education from the Wisconsin Family Business Forum (WFBF).

To enhance the ability of participants to learn from each other, the course will be limited to a cohort of 15 participants, with no more than three participants from any one organization.

Defining the Family Business

How family systems dynamics impact governance, legal, accounting, wealth management and human resource management perspectives

Family Business Governance

Options for management of family business — a variety of human resource and general management topics are covered

Strategic Planning in a Family Business

How to engage in strategic planning for both the family and the business, and how to merge these often competing plans

Business Management

Options for the compensation, promotion and other human resource issues in a family business

Evolving Ownership in the Family Business

How to manage succession planning and the evolution of ownership in a family business

Evolving Leadership in the Family Business

How to maximize the benefits of, and overcome the limitations of, being “the next generation” of a family business; How to manage the often critical role of non-family members in the leadership of a family business

Managing Culture, Change, and Conflict

How to manage these critical dimensions in a family business



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[FBE is]

- “a growth opportunity.”
– Heather Gonyo
- “helping to build the confidence of the next generation.”
– Jon Faulks
- “unlike a classic business school education—it has nitty-gritty, practical information...”
– Steve Weinert



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Past Presenters

Ron Altenburg, Shareholder, Schenck, SC

Ashay Desai, Ph.D., Associate Professor of Management, UW Oshkosh College of Business

Phil Florek, Executive in Residence, UW Oshkosh

Dale Feinauer, Ph.D., Professor of Human Resources UW College of Business and Faculty Liaison of WFBF

Sandy Friess, CPA, Partner, Wipfli, LLP

E. Alan Hartman, Ph.D., Professor, UW Oshkosh College of Business

Julia Johnson, Senior Manager of Human Resources Consulting, Wipfli, LLP

Bob Mathers, Attorney/CPA, Davis & Kuelthau, SC

Tom Moniz, Corporate Attorney, Davis & Kuelthau, SC

Diane Roundy, Director of Business Development, Schenck SC

Steve Sorenson, Shareholder, Davis & Kuelthau, SC

For more information regarding the program, please contact:

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Policies:

- First-come, first-serve registration
- Maximum class size 15; a waiting list will be generated for future classes
- All sessions must be taken to receive certification. In the case where missing a session is unavoidable, the session can be made up when the session is offered again next year.
A person missing one session can still graduate with their class.
- Participants are expected to spend time outside the class doing homework which might include studying their own businesses and families

Fee:

\$500 per person for WFBF members and sponsors
\$1,500 per person for non-WFBF members and sponsors

EARLY BIRD DISCOUNT IF REGISTERED 30 days in advance:

\$350 for WFBF members and \$1,275 for non-WFBF members.

Register at:

<http://wbf.uwosh.edu/Assets/basics.php>

Deanne, Jason and Heather have come back to us with so many questions from the education series, which has helped us in determining next steps in what to share with them at our meetings to prepare them for the future.

Vicky Wuest
Badger Mining Corporation

**For more information
please visit our website:**

<http://wbf.uwosh.edu>