



News Briefs

May 2006



Welcome— Zuern Building Products, Inc.

Zuern Building Products has been operating as a full line building material supplier to the professional homebuilder and commercial contractor for over 50 years with locations in Allenton and Watertown, Wisconsin.

It all started back in 1954 when Louis and Irene Zuern purchased a small lumberyard named Weis Lumber in Allenton, Wisconsin and renamed it Allenton Lumber & Fuel. In 1970, Allenton Lumber & Fuel was sold to sons Don, Bob, and Joe Zuern. The company was then renamed to Zuern Building Products and had a total of 5 employees. In 1985, the Zuerns bought Hanson Lumber in downtown Watertown, Wisconsin.

Zuern Building Products offers lumber, plywood, roofing, siding, drywall, doors, windows, millwork, hardware, tools, decking, kitchen and bath cabinetry, and closet systems. Zuern also provides deck, garage, kitchen and home design services, tool repair and rental, and delivery services.

Currently, Zuern Building Products is in transition into its third generation of family ownership. The third generation includes Dave, Jim, and Greg, sons of Don and Jan Zuern; Tom and Brian, sons of Bob Zuern; and Jenny, daughter of Joe Zuern.

Craig Smith of Retained Earnings will be their Forum buddy. We look forward to learning and growing with Zuern as part of the Forum family.

10th Annual Dinner: Celebrating a Family's Heritage

Wednesday, May 24, 2006
Bridgewood Resort Hotel, Neenah

The Gentine family story will lead us through the family's challenges and successes as their \$534 million business, Sargento Foods Inc., grew and as the loss of their father, Leonard, led the second generation to consider the core values that created the business culture that fostered Sargento's success.

Lou Gentine, 2nd generation owner and CEO, has agreed to share his family's challenges and successes.

We invite our members and sponsors to join us for a social hour before dinner. During the evening, we will recognize some extraordinary people who had the vision to conceive and begin the Forum back in 1996. We will also recognize the first recipient of the Wisconsin Family Business Forum scholarship.

As always, we hope you will bring your family and associates for this enjoyable evening. We encourage you to make your registrations on our web site as soon as you have talked to your family and associates about joining us for the evening.



Forum Family Picnic

August 2, 2006
Plamann Park, Appleton

For a second year, the Forum is planning a family picnic to bring together member and sponsor families during the summer.

The picnic will be held in the Pavilion that offers shelter from the sun and, if necessary, from the rain. Its location in the park is adjacent to playground equipment, hiking path, ball diamonds, and the disc golf course.

Children of all ages (infants to seniors) can enjoy the company of other members of the Forum family while enjoying great summer foods.

The Forum will provide the basics: meat, buns, condiments, plastic and paper products. The Program Committee will serve as the cooks.

Forum members and sponsors are asked to provide the fun foods—snacks, side dishes, salads, and desserts keeping in mind the appetites of younger and older folks.

Please place this event on your family's calendar and watch for details closer to the picnic date.



First Forum Scholarship Award

The Forum's scholarship committee recently determined the recipient of the Forum's first scholarship award. This is another exciting *first* for the Forum. In 1996, as the Forum was being conceived, the idea of awarding a scholarship to a student interested in family business was drafted into the future plans for this organization.

Now, as part of the observance of the Forum's 10th anniversary, we are excited to see this become a reality. The first award will be presented to the qualified applicant as part of our annual dinner on May 24th.

Forum members and sponsors have been contributing to an endowment fund to ensure that a scholarship or scholarships can be awarded on an annual basis.

We encourage all of the Forum family to keep this scholarship on your giving agenda to help us fully fund the endowment.



Peer Group Meetings

Next Generation Group:

With a focus on personal development, this group of a dozen next generation family members has been meeting on a monthly basis to identify knowledge, skills, and abilities they need.

By studying topics of interest and holding each other accountable for the goals they set for themselves, this group has developed a strong network of young professionals with whom to work.

The March meeting was hosted at Mackinaws in Green Bay by Jane Sweasy, JAG Outdoor Advertising.

The group will meet again on May 12 to follow the progress of a specific homework assignment, discuss incentive compensation, plan a summer gathering in Algoma, and create a survey to send to the Forum members regarding interest, availability, and value each could add to another business' board of directors.

Successors Group:

Steve Kamrowski and Mike Hackbarth discussed their transition to Flex-Staff's ownership and leadership with the Successors on March 12th. Group members had an excellent opportunity to get detailed answers to questions and explore application of the information to their own business circumstances.

On April 25th, the group met with Dr. Linda Hartenian, UW Oshkosh College of Business, to focus on developing a personal development plan for their individual and business needs. This discussion provided a lot of suggestions and direction for proceeding with development of each person's plan.

Non-Family Group:

This group has grown to a dozen members over the course of its first four months. Participants represent a wide range of executive responsibilities and of business types and leadership generation.

Nevertheless, the members have found many things to talk about and to learn from one another. Recent topics of discussion included:

- speaking to an owner about a decision/plan about which you disagree with another family member;
- mentoring family members ;
- the process for profiling yourself and your company with the objective of developing leaders for the business.

If you, or a member of your business, would like to learn more about this group, please contact Sue.

Best Practices:

Wow! Taxes are filed and done for the year. Wait! *Done?* I'm told that *done* isn't a word that can be applied to tax planning. So, prepare to attend the next Best Practice session, *Tax Updates and Incentives for You and Your Business*.

This session will be presented by Todd Behm of Schenck Business Solutions on May 11 at Butte des Morts Country Club. The session, which will run from 11 am to 1 pm, will include lunch provided by Schenck.

Registrations for this session are due by May 9 and can be made through our web site.

IT Group

The Information Technology group will meet again on June 6, 11:30 am—1 pm at Schenck Business Solutions in Appleton. Jim Tarala of Schenck will host this meeting and lead the discussion of document management.

If you are interested in participating, contact Sue.

Member News

Marion Body Works, Inc. received the 2005 SPARC Award from Spartan Motors. The award recognizes their performance based on on-time delivery, quality, and customer service. This is the second year in a row that Marion Body Works has received this award.

RB Royal Industries, Inc. was recognized by Marian College as the Business of the Year. RB is involved in developing a "lean enterprise" culture for continuous improvement and workplace organization.

Debra Hackel-Gostas and Craig Smith, Retained Earnings Company, achieved membership in the Million Dollar Round Table's prestigious Top of the Table. This recognition is made by The Premier Association of Financial Professionals, an international, independent association of less than 1% of the world's best life insurance and financial services professionals. Only those who demonstrate exceptional professional knowledge, client service, and ethical conduct achieve this milestone.

International Family Business Workshop

Member and sponsor response to the interest survey regarding an international workshop for 2007 was rewarding. Between 35 and 45 individuals indicated their interest in participating. Interest also indicated that they would prefer to travel to the Netherlands and Belgium to meet with family business owners, many of whom are in the 5th to 14th generations of their businesses.

As details regarding the itinerary, workshop, and pricing become available, you will be informed and asked to indicate your commitment to participate.

You Are Needed!

The Forum needs members to fill two vacancies on the Program Committee and three vacancies on the Recruitment and Retention Committee.

Please consider volunteering to serve on one of these valuable Forum committees. For further information, contact Sue.

Director's Column

Sue Schierstedt



Shortly, each member will receive a letter with proposed Bylaws changes and a ballot for your vote. Please review the proposed changes and promptly return your ballot. While the Board recommends changes, the membership must approve any changes to make them effective. The Forum exists for the benefit of its members. Your vote is very important. Thank you in advance for responding.

The Board has recently discussed the apparent lack of clarity that exists regarding the role of the Forum's sponsors. These professionals have been invited to participate in the Forum because of their expertise in family business services. Their financial support is part of their contributions to the Forum; although vital, it is not their most valuable contributions. Their most valuable contributions are their willingness to share their experience and expertise with our members.

Members should feel free to ask these professionals for their experience and advice on issues of concern to them. Sponsors will gladly respond to your inquiries and, although not directly asked, may overhear your concern and jump into the discussion to offer their assistance.

Yes, the Forum admonishes both members and sponsors against *active selling* at Forum activities. However, this should not keep either a member or sponsor from seeking and/or offering advice and guidance.

I hope this has helped to dispel the confusion and to encourage you to fully utilize all the valuable resources of the Forum, including our sponsors.

Hiring update: We are still in the process of finding a successor for Mary Weddig. Interviews with qualified applicants are being scheduled at this time.

Sue

Wisconsin Family Business Forum Program Calendar

2006

Date	Event	Presenter(s)
May 24	<i>Annual Dinner: A Family's Heritage</i>	Lou Gentine Sargento, Inc.
Aug 2	<i>Family Picnic</i>	Program Committee
Aug 22	<i>Facilitation Training</i>	Dale Feinauer UW Oshkosh
Sep 14	<i>Communications, Collaboration & Teamwork</i>	Sharon Krone Family Business Consulting Group, Inc.
Oct 24	<i>Leadership Styles in Family Business</i>	Pathmakers, Inc.
Dec TBD	<i>Choosing & Using Advisors</i>	Panel of Owners and Advisors

2007

Jan 25	<i>Gender Issues</i>	Tom Jadin
Mar 14	<i>Harnessing the Power of an Independent Board</i>	Norb Schwarz Family Business Consulting Group, Inc.

UW-Madison Family Business Center

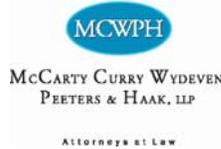
2006

May 9	<i>Managing Change in the Family Business</i>	Bob Shaver UW-Madison
Oct 24	<i>Effective Leadership in the Family Business</i>	Drew Mendoza Family Business Consulting Group, Inc.

The Forum thanks the following sponsors for contributing significant value to keep the Forum at the forefront of family business programs, worldwide:



First National Bank — Fox Valley has a competitive advantage of developing strong, close customer relationships, especially in the niche of family-owned businesses. Thanks to a dedicated staff, FNB has completed its 117th year of providing financial services to the people and businesses of the Fox Valley with locations in Appleton, Menasha, Neenah, and Oshkosh.



McCarty Curry Wydeven Peeters & Haak, LLP has been serving the legal needs of large and small family businesses in northeast Wisconsin since 1949. The firm's services include all aspects of business and corporate law, real estate, complex estate planning, commercial and personal litigation, as well as general practice.



Pathmakers, Inc. has been serving family businesses since 1995. This partnership of four focuses on the incorporation of people, process, and plan into family businesses of all sizes. Their mission is to help leaders fully understand their personal impact on those around them in order to have the courage and faith to challenge their people and their organization for enduring success.



Retained Earnings Company has been providing business owners and their employees with solutions to their insurance and investment needs for over 25 years. The Retained Earnings team brings expertise in the areas of financial, estate and business succession planning, 401k's, employee benefits, investments, life, health, disability, and long-term care insurances.



Schenck Business Solutions is a full-service regional accounting and consulting firm with nearly 600 employees, serving businesses and individual clients through its 11 Wisconsin locations. As one of the largest Wisconsin-based CPA firms in the state, Schenck Business Solutions provides a full range of services including tax, business consulting, information technology, retirement planning, and human resource solutions for today's business, government and personal challenges.



University of Wisconsin Oshkosh, College of Business Administration provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.

Associate Sponsor:



The Business News is a local business newspaper serving a 10-county area of northeast Wisconsin. It focuses coverage on the Northeast Wisconsin area that matters most to you and your customers.



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