

News Briefs

Interim Director Report

Sue Schierstedt

As many of you know, the Forum is in the midst of a leadership transition. I am delighted to have been asked to assist the Forum for the next few months until a new Executive Director is hired. The Forum's Board of Directors has established a Search & Screen Committee that has recently published the Executive Director position and is preparing to interview applicants. I have posted a link to the position announcement, description, and application information on the Forum's homepage.

In the meantime, I, along with Emily Gneiser, am working with the Board and Committees to finalize plans for the upcoming program year. I am also happy to follow up with any family businesses that should be invited to the Forum. So, please don't hesitate to forward that information to me.

Introducing Emily Gneiser

The newest edition to the Forum's staff is Emily Gneiser, the daughter of former Board member, David Gneiser & Lorrie Gneiser of Fond du Lac Bumper Exchange, Inc. Emily was on the Board of her family's business and, as you would expect, helped out in various functions over the years.

Emily has excellent experience in event planning and administrative responsibilities. As such, she was able to step in to the Forum's Assistant Director role very smoothly upon the sudden resignation of Mary Chapin in early April.

As those of you who were at the Forum's 19th Annual Celebration know, the event was a flawless success. That was in large part due to Emily's ability to work effectively in a new organization.

Please help me welcome Emily. She can be reached at gneisere@uwosh.edu and 920-424-1541.

Introducing Members

Schaefer Behnke Group LCC.



As a first generation business, Schaefer Behnke Group was founded in 2010 and is co-owned by Bret Schaefer and Nick & Jen Behnke.

Schaefer Behnke Group, LLC – Retirement Income Specialists is a full-service financial planning practice located in Oshkosh, working with Landolt Securities, Inc. Schaefer Behnke Group focuses on assisting with retirement income planning, as well as advising in beneficial products that may help further protect one's retirement income. The Schaefer Behnke Group, working with Landolt Securities, Inc.'s network of financial professionals, has access to a wide variety of investment products.

Schaefer Behnke Group is The Blue-Collar Income Specialist.

Camera Corner

Connecting Point



From beginning with a staff of two in 1953, this third generation business has grown to a staff of over 100 employees. Camera Corner Connecting Point is the oldest camera/computer store in Northeast Wisconsin. Their mission is to provide their customers with the highest quality products and services at the best value.

Whether you are buying a camera or a complete computer network, they will work to provide the best possible solution.

Rick Chernick, CEO, is often quoted as saying, "We aren't the best because we are the oldest; we are the oldest because we are the best!"

Three family members are currently involved in the business: Rick, son Ryan who is Executive Vice President, and son Ben who is a manager. Thanks to Anika Capelle of Conger Industries who referred them to the Forum.

Camera Corner Connecting Point stands by three mottos: work hard, care, and have fun!

Program Underwriter

44° North Advertising & Design



44° North Advertising & Design is a full service advertising agency that provides graphic design, website design and development, social media marketing, strategic planning, public relations services, media placement, and event marketing services is our newest sponsor/program underwriter.

The company is 25+ years old with clients throughout the Fox River Valley and the state of Wisconsin. Their forte is walking clients through rebranding or brand launch, as well as getting them up to speed with a new or refreshed website.

44° North's customer base varies from small 'mom and pop' organizations to Fortune 500, publically held companies.

Diane Penzenstadler, president, hopes to acquire a better understanding of the needs of family businesses while assisting the Forum with their resources.

Sponsor Introduction

Bank First National



Bank First was founded in 1894 and was originally known as the Bank of Manitowoc. Bank First now has grown to a total of 12 office locations throughout the Northern, Central, Southern, and Fox Valley regions. Its newest location opened in February of 2011 in downtown Oshkosh.

Today, Bank First remains one of the few independent community banks left in the area. The Bank has experienced steady growth for the past several years. Each office offers loan, deposit, asset management, investment advisory, and trust products. The Bank employs approximately 155 full-time equivalent staff and had assets of \$1.039 billion (as of September 30, 2013).

As they grow, they continually re-invest in the communities they serve. Bank First National are your independent, locally-owned, community banks here to serve all your financial needs.

Bank First national states the following as their mission statement: Our Promise: We are a relationship-based community bank focused on providing innovative products and services that are value driven.

Five members of their team plan to participate in the Forum: Joan Woldt, Regional President; Mike Dempsey, Executive Vice President/COO; and Vice Presidents — Meghann Kasper, Bill Bradley, and Joe Steber.

Announcements

Utech Customized Organizational Development has moved to 1537 American Court, DePere, WI 54115. Their new website address is: www.utechOD.com



Key leadership changes were announced by J. J. Keller & Associates. A third generation of family members took the reins at J. Keller & Associates Inc. on New Year's Day, 2014, carrying on the legacy that founder John "Jack" Keller started 60 years ago. Marne Keller-Krikava serves as J. J. Keller's first female president and CEO, succeeding James Keller. Her brother, Rustin Keller, assumed the role of executive vice president and chief operating officer.



18th Annual Celebration

May 5, 2014

Bridgewood Resort Hotel, Neenah, WI

Members and sponsors gathered for a wonderful evening which began with cocktails, hors d'ouerves, and our 8th Annual Silent Auction.

Recognition was made of all the members and sponsors who commit their expertise and time to make the Forum a valuable family business resource.

Mike Dugan, UW Oshkosh student, was awarded this year's scholarship in absentia. Mike was in Germany as part of his course work and sent his regrets for being unable to attend.

The high point of the evening was Bob Keller's presentation that highlighted the history and growth of J. J. Keller & Associates, and included a description of the succession planning and transition of Marne and Rustin to leadership.

Thank you to all who joined us for the Celebration!

8th Annual Silent Auction

Twenty-seven excellent items were donated for this year's Silent Auction which benefitted the Forum's Scholarship Fund.

Through the generosity of all participants, the Forum raised **\$3,540.00** for the student scholarship fund!

Thank you to the Silent Auction committee for your diligence in acquiring, delivering, and displaying all the items.

Family Business Education (FBE) Certificate Program

Eleven Forum members are graduates of this year's FBE Certificate program. Each member participated in discussions and analysis of the following topics:

- Defining the family business
- Family business governance
- Strategic planning and project management
- Business management, legal liability, banking, sustainability, and tax structure
- Evolving ownership and human resources
- Evolving leadership
- Managing culture, change and conflict

The program was coordinated by Dale Feinauer and led in collaboration with sponsors and College of Business faculty.

Program fees remain the same for the upcoming program.

- \$500 per person for WFBF members and sponsors
- \$1,500 per person for the general public

An **early bird rate** will be available through September 1, 2014. Sessions will begin October 2014.

To learn more about the 2014-2015 program and get on the waiting list, contact Sue Schierstedt at wfbfdirector@uwosh.edu or 920.424.2257, or Dale Feinauer at Feinauer@uwosh.edu.

Program Reciprocity with the Family Business Center at UW-Madison

Forum members are eligible to attend the family business lectures offered by the Family Business Center (FBC) at UW-Madison in accordance with our reciprocity agreement.

Members are charged a nominal per person fee for each lecture attended and are required to pre-register for each. Please check their website for the most current listing of upcoming events and for full details see <http://bus.wisc.edu/cped/fbc/events>.

This is an excellent way to stretch your membership to include additional topics and interactions. Please consider taking advantage of this.

Bring a Guest or Be a Guest

Family businesses learn about the value of the Forum primarily through personal invitations from our members and sponsors.

Any family business that is interested in learning more about participation in the Forum is welcome to attend one program at no charge as our guest. What better way to see what the Forum has to offer than to actually participate in a program and talk with Forum members and sponsors!

Wisconsin Family Business Forum Program Calendar

<u>Date</u>	<u>Event</u>	<u>Presenter(s)/Facilitators</u>
7/9/2014	<i>Healthcare Update I</i>	Sponsors
8/13/2014	<i>Facilitation Training</i>	Dale Feinauer, UW Oshkosh
8/28/2014	<i>Family Business Visit & Picnic</i>	Printco, Bank First National, Davis & Kuelthau
9/24/2014	<i>Negotiate 4 Profit</i>	Tom Parker, Senior VP of Yukon Inc.
Register online at http://wfbf.uwosh.edu — Programs/Registrations link		
Family Business Center at UW-Madison Calendar		
<i>Check the website for upcoming lectures</i>		
Register online at http://bus.wisc.edu/cped/fbc/events		

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



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