

| Breakout Session Descriptions |

Retirement | Non-fiscal Retirement Planning: Are You Ready to Add “former” to Your Title?

SESSION DESCRIPTION

Everyone has thought about retirement-- endless days on the golf course, grandkids splashing around in the swimming pool, and mid-week jaunts to the wine country. But, do you really want to give up your career and, if so, how do you get to those carefree retirement days? Does one transition out slowly or quickly? What does the first Monday of retirement actually feel like? How do you navigate the identity shift from CEO to former CEO? And, how does this identity shift affect your relationships with family, friends, peers, and the community.

PRESENTED BY

Steve Fleming, President and CEO, River City Bank
Lon Burford, Retired, Co-Founder and Partner at Genovese Burford & Brothers
Larry Jacobson, Author, Speaker, Retirement Coach
Carol Burger, President, Burger Rehabilitation Systems, Inc.

Philanthropy | Giving Back: Community Involvement Strategies from Philanthropy to Service

SESSION DESCRIPTION

A discussion on how companies of any size can give back to the community through service and philanthropy. Learn best practices for starting a program, growing a program, and how to engage your employees.

PRESENTED BY

Paul Endelman, Project Manager, Balanced Body
Sierra Grossman, Vice President, Sierra Nevada Brewing Co.
Shari Roeseler, Executive Director for the Society of the Blind
Kerry Wood, Chief Marketing & Donor Engagement Officer-Sacramento Region Community Foundation

Governance | Professionalizing Your Board

SESSION DESCRIPTION

More family businesses are interested in corporate governance today than a decade ago, as seen in some of the changes made to their boards and results from our Family Business Survey. While some families have a board only to satisfy legal compliance requirements, more are thinking strategically by moving towards more mature policies, procedures and structures for their governance systems. What's the role of a family business board, and what are the steps to creating one? How do you know if your family business is ready for a board of directors?

PRESENTED BY

Carin Robinson, Corporate Governance Director, Family Enterprise Advisory Practice, PwC
Langdon Evans, Manager, Family Enterprise Advisory Services, PwC
Don Yee, Board Director, Business Advisor & Executive Coach