|Breakout Session Descriptions|

Marketing | What You Need to Know to Successfully Market Your Family Business

SESSION DESCRIPTION

Learn how three family businesses identified their marketing 'superpower', the tools they use, and how this strategy has benefited their business. We'll examine the strategies employed, share mistakes they made along the way, and provide tips to implement your own impactful marketing program.

PRESENTED BY

Mary Towne, Founder, CEO Elevate Public Relations & Marketing
Forrest Wilkins, Co-Owner / Marketing Campaign Manager, ClearBags
Donald Ratajczak, Media Buyer, CFO, S&G Carpet and more

Family Dynamics | How do you investigate and discipline Uncle Bob (or any other member of a family business for that matter)? A Case Study

SESSION DESCRIPTION

The law requires employers – including those that are family businesses – to promptly investigate and take appropriate remedial action when they receive a complaint of harassment or other misconduct in the workplace. This obligation is often a difficult and time-consuming task for employers but can become even more so for a family business when the complaint is made against a family member. But, don't worry… the attorney-investigators from Weintraub Tobin's Labor and Employment Group will present a case study that will walk attendees through the entire process.

PRESENTED BY

Lizbeth V. West, Chair, Labor and Employment Group, Weintraub Tobin
Shauna N. Correia, Shareholder, Weintraub Tobin
Ryan E. Abernethy, Associate, Weintraub Tobin

Wealth Management | Sophisticated Family Investments – Why, How and When to Incorporate Private Investments into Your Family Investment Portfolio

SESSION DESCRIPTION

Private equity, hedge funds, venture capital and private real estate investments are becoming more commonplace in family portfolios. Learn techniques to evaluate investment ideas, avoid scams, and earn higher returns when these assets complement your traditional investment portfolio.

PRESENTED BY

Steve Mills, DCA Partners
Jason T. Bell, CFA, Partner and Chief Investment Officer, Capital Planning Advisors, LLC
Ryan M Chapman, CIMA, Vice President, Private Wealth Solutions, Blackstone