|Breakout Session Descriptions|

7 Marketing | **Level Up Your 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
Lauren Henley, Social Media Marketing Manager/Content Creator, Green Acres
Natalie Kling, Marketing Strategist, Mariani Packing Company
Brita Lundberg, Marketing Coordinator and Family Storyteller, Lundberg Family Farms

8 Family Dynamics | **How do you Investigate & 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
Meagan Bainbridge, Shareholder, Weintraub Tobin
Ryan E. Abernethy, Associate, Weintraub Tobin

9 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

Craig Mitchell, Partner, DCA Partners
Jason T. Bell, CFA, CIO, Managing Director, Capital Planning Advisors
Ryan M Chapman, CIMA, Principal, Private Wealth Solutions, Blackstone