



## 2021 Family Business Educational Programs

**Theme:** Creating Cultures of Accountability

**Book:** You will receive [\*The Ideal Team Player\*](#) in which our favorite author, Patrick Lencioni, describes the 3 key attributes of team players – Humble, Hungry and Smart – which drive the highest levels of team accountability and performance. Learn how our Members are recruiting, selecting and nurturing Ideal Team Members in each of their [5 MOUNTAINS®: Family, Shareholder, Management, Board, Advisers](#). And how they are leading, communicating, and adapting while navigating the uncertainties in which we all live.

We will start our Programs virtually and look forward to shifting to in person in small groups or larger groups when we can gather again together safely. Like last year, all of our virtual events will be recorded and available to Members to view at your convenience. And we're working on an interview with Lencioni as well!

Join us as we share best practices & principles from our more than 30 years of working with and learning from business families & learn invaluable, relevant thought leadership from our [EDU Sponsors!](#)

**Jan 13**

1-2:30 pm

### [How do We Navigate the Evolving HR Issues brought on by COVID?](#)

*While we were hoping the pandemic disruption would be short-lived, a year later we are still adjusting, flexing and learning. What are we learning: about customer service? about resilience under pressure? about working remotely? about collaboration over the internet? About staying connected as teams? And what are the legal issues we should be aware of?*

Ethan O'Shea, Hamburg, Rubin, Mullin, Maxwell & Lupin  
Jeff Green, Principal, Proxus



**Jan 21**

3-4:00 pm

### [PPP Old and New – What a Borrower Should Do](#)

*The PPP loan program was recently changed as a result of the Economic Aid Act that was signed into law on December 27, 2020. This Act provides additional federal stimulus money for the PPP program and includes several changes to the existing PPP Loan program as well as introducing the Second Draw PPP Loan program.*

Mario Vicari, Director, Kreisler Miller



**Feb 25**

9-10:30 am

### [The FAMILY MOUNTAIN: Connecting, Educating, and Clarifying Expectations](#)

*We will explore how "Humble, Hungry and Smart" starts at home and in adulthood finds expression in healthy communication & connections; how to "find my voice," invaluable outside work experience, build self-awareness and self-regulation in powerful family systems; understand freedom of clear expectations and policies about Employment; life-long Learning and the Path to Shareholdership. Children and adults learning and creating together that which we most desire: healthy (not perfect) families and sustainable enterprises through the generations!*

Brittany Lukens Heil, G3 Family Council Chair, Shareholder, Laboratory Testing, Inc., Hatfield, PA  
Duane Bergey, G3 Chief Relationship Officer, Shareholder, Board Member, Bergey's, Inc., Franconia, PA  
Sally Derstine, Managing Partner, DVFCB



**April 8**

9-10:30 am

**[Leveraging the Power of Data & Technology to Achieve Long-term Sustainability](#)**

*In the past months, businesses have done what was necessary to keep operating. However, this approach won't sustain them long-term. Hear first-hand experience with clients navigating through disruption and implementing changes to transform their business model. This presentation addresses new tools including Data Analytics and re-vamped processes.*

Gretchen Naso, CVA, MBA, of RKL;  
Jeremy Witmer, CPA, CVA, CPE, of RKL



**April 29**

9-10:30 am

**[The Shareholder Mountain: Balancing Risk, Values & Accountability](#)**

*Learn about the critically important stewardship responsibilities expected from shareholders and how "Humble, Hungry, and Smart" can be integrated into a shareholder preparation plan.*

*Learn how an aligned, competent, committed shareholder team can make or break a governance system; how family firms of different sizes and complexity educate and prepare their shareholders on the Path to Shareholdership and some of the key responsibilities which include selecting board directors, Charitable Giving Policy, etc.*

Nellie DiPietro, G3 Shareholder, Virtual Service Coordinator, Lincoln Investment Planning, Fort Washington, PA  
Tara Bahn, G5 Shareholder Services, Clemens Family Corporation, Hatfield, PA.



**May 12**

9-10:30 am

**[Considerations When Pursuing an Acquisition as Part of Family Business Growth Strategy](#)**

*Family businesses grow organically as well as through acquisition – either to increase your geographical footprint or expand into new (but similar) product lines or services. What does a successful acquisition strategy look like?*

Andrew Grau, Partner, HRMM&L;  
Steve Staugaitis, CPA, CVA, Kreischer Miller



**May 27**

9-10:30 am

**[The Board Mountain: Balancing Accountability Between Shareholders & Management](#)**

*As families grow and enterprises expand, many family firms invite "outside or independent" directors to provide objectivity, seasoned counsel, and accountability for both management and shareholders.*

*Learn when, why and how family firms voluntarily submit themselves to higher levels of accountability; and the value-add for the business and for the family.*

David Griffith, Executive Director, Episcopal Community Services, Philadelphia, PA  
Julia Klein, G3 Owner, Chairwoman and CEO, CH Briggs, Reading, PA



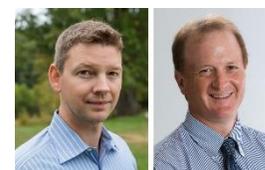
**June 22**

9-10:30 am

**[The Management Mountain: Strategy, Culture and Accountability](#)**

*One of the most challenging roles in a family firm is president which absolutely requires the virtues of "Humble, Hungry and Smart." We will explore how family firms select worthy/ideal presidents and team players. We will hear Brandon's journey in being selected as G3 president in 2020 and how LTI has developed written Fundamentals to create the culture of teamwork, performance, and accountability.*

Brandon McVaugh, G3 President, Shareholder, Board Member, Laboratory Testing Inc., Hatfield, PA  
Jim Smucker, President, Keim Lumber, Charm, OH



**Sept 23**

**[The Advisor Mountain: Herding Cats](#)**

9-10:30 am *Learn wisdom and practices gained from experienced advisors who have been guiding family firms and collaborating with other advisors on business issues, management and ownership transitions, and avoiding unintended consequences that many advisors do not. Like every high performing team, we need to upgrade “Humble, Hungry and Smart” advisor teams. Learn how to select and evaluate key advisors, plan for Annual Advisor Meetings, and how Professional Advisory Councils often can serve as a bridge to a Board.*

**Oct 21**

9-10:30 am

**[Managing the Slippery Slopes of Family Business - Blessing or Burden; Is it for Me?](#)**

*Family business partnerships are often created by birth, not choice. How can we prepare our children, grandchildren, and married-ins from the slippery slope of family business so they flourish and aren't trapped? How can we grow children who are “Humble, Hungry and Smart” and know themselves so they stay true to themselves, connected to the family, and find a path that is meaningful in some or all of the 5 MOUNTAINS? or outside of the family business?*