

Theme: Creating Cultures of Accountability

Book: *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.

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, Kreischer 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, DVFB](#)



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 4

10-11 am

[Uh-oh! Here Comes the PRO Act – Implications for Family Businesses](#)

There is a very important piece of legislation moving through Congress right now call the PRO ACT (Protecting the Right to Organize). If passed, the PRO Act will fundamentally rewrite labor law in the US with major ramifications for nonunion and union employers, large and small. I want to make sure you all are aware of it.

Robert Nagle, Partner, Fox Rothschild LLP



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, Kreisler 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

Henry Landes, Founder and Senior Family Business Advisor, DVFCB



June 22

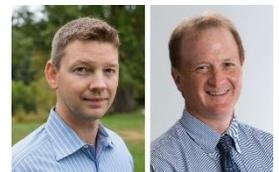
9-10:30 am

[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, Laboratory Testing Inc., Hatfield, PA

Jim Smucker, President, Keim Lumber, Charm, OH



July 8

9-10:30 am

[Creating Buy-Sell Agreements that Properly Address Family AND Business Issues](#)

Most family business owners do not have a properly designed buy-sell agreement which puts both the family and the business in jeopardy. While buy-sells are created with the best of intentions, there are often many unintended consequences which lead to confusion for both the family and the business.

Ian Meierdiercks, Wealth Management Partners

Mike Maransky, Fox Rothschild, LLP



Sept 22

9-10:30 am

The Advisor Mountain: Herding Cats

Most family businesses survived and even thrived in the early years due to hard work, major risk taking, dogged persistence, and family talent. These elements aren't enough to guarantee long-term success for the family OR the business. Working smarter, not harder, includes finding the right advisors to guide the family and business through the normal and ongoing emotional, relational, management, financial, legal, tax, and structural complexities.

Robbie and Karen Keim, Keim, Charm, OH



Oct 21

4-5:30 pm

AWEsome Conversations: Women Successors Tell their Stories Transitioning to CEO in a Multi-Generational Family Business

For generations women were not considered to give senior leadership to the family enterprise. That trend is changing—sometimes by design and sometimes it's an unexpected boomerang phenomenon. Join the conversation as we hear the journey of 3 women leaders and their very different paths into their current roles of leading the family business. Hear how they overcame obstacles, biases, and charted their own course.

Heather Chandler, Sealstrip Corporation, Gilbertsville, PA
Beth Hahn, Berkshire Systems Group, Inc, Reading, PA
Karla Trotman, Electro Soft, Montgomeryville, PA



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