



# Delaware Valley FAMILY BUSINESS CENTER

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## OUR PURPOSE

To help business families flourish as individuals, families, & enterprises.

## OUR VALUES

### WHOLE—HEARTEDNESS

We engage others with mental clarity & emotional maturity as we work toward measured results.

### ADAPTIVE CREATIVITY

We bring a deep curiosity to our relationship with each person, family, & business.

### COMMON GOOD

We seek the common good for families, businesses, & shareholders.

## A FULL-SERVICE FAMILY BUSINESS EDUCATION, PLANNING, & ADVISING FIRM

Serving hundreds of business families since 1988

## OUR PROCESS

### CHART THE PATH

Family businesses are filled with their own unique complexities. So we design custom paths and plans for each family to gain clarity and confidence, all based on our 5 MOUNTAIN® Process.

### TEACH THE PRINCIPLES

While there is no one-size solution for business families, in working with hundreds of families we have discovered and now teach important principles that set apart those who flourish from those who don't.

### DEVELOP PEOPLE & TEAMS

Each family and business system is only as strong as the leaders who are a part of it. We provide programs for personal, leadership, and team development so that flourishing starts with the individual and spreads to the family, business, and community.

### GUIDE THE PROCESS

In addition to educating business families on the path and the principles, we lead and facilitate family and team meetings to guide them step-by-step.

At DVFBC, we surround our business families with support. From our educational events, peer groups, and our planning and advising services, our priority is that each of our members flourish as individuals, families, and enterprises.

## SOME OF OUR SERVICES

- ▲ Intergenerational Succession Planning
- ▲ Management Transition Planning & Support
- ▲ Family Council & Ownership Consulting
- ▲ Meeting Facilitation & Mediation
- ▲ Rising Generation Leadership Development
- ▲ Senior Generation Transition Support
- ▲ Board Development
- ▲ Family Business Education
- ▲ Advisory Coordination & Planning



## 5 MOUNTAIN<sup>®</sup> PROCESS



While every situation is unique, and the services we provide are customized to each family, the 5 MOUNTAIN<sup>®</sup> Family Business Process has been an invaluable tool on the journey.

It helps us understand that preparing business families for generations of success is a journey that involves developing 5 interdependent teams who work together with clear roles, responsibilities, and relationships. This requires an investment of time and money in the continuous development of the Family, Shareholder, Board, Management, and Advisor teams, as well as each team member.

