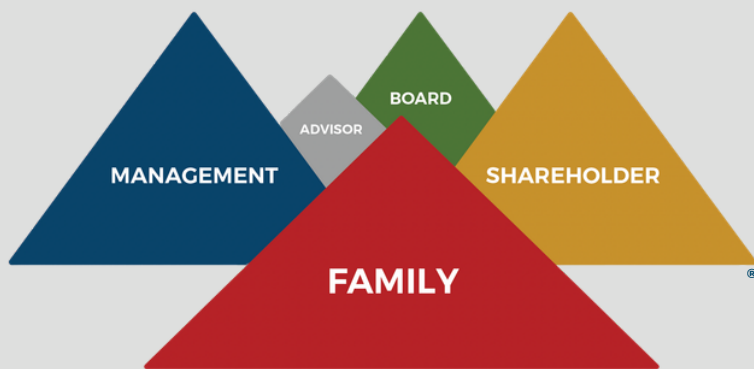


Introducing Our 5 MOUNTAIN[®] Model

Generational success in family enterprises doesn't happen by chance. It's built through the continuous development of individuals serving on five *interconnected* teams, leading with clarity, competence, and confidence.



**We Build Aligned, Competent, Strategic Teams
on Each of Your 5 MOUNTAINS[®]**

Family Members, Shareholders, Directors, Executives, and Key Advisors work together to understand the purpose, responsibilities, and boundaries of each Mountain. The Mountain teams are exquisitely linked creating powerful synergy or chaos.

The intentional development of Whole-Hearted Family Leaders is foundational to the success of the entire system.



Whole-Hearted Leaders

Each family member cultivates a Solid Sense of Self while staying emotionally connected to one another's growth and success. The work of self-understanding and self-regulation deepens and evolves over one's life cycle, particularly in relation to others.

- Curious
- Vulnerable
- Courageous
- Compassionate
- Authentic
- Willing to apologize & forgive
- Accountable
- Decisive
- Disciplined
- Straight-talkers
- Empowers others
- Willing to admit and learn from mistakes



Family MOUNTAIN

The bedrock of every family business, the Red Mountain Team builds "family muscle" through nurturing respectful, resilient, intergenerational relationships.

- Celebrates personal/professional development (whole-hearted leaders)
- Supports healthy marriages and childrearing
- Clarifies healthy boundaries within the family and between the Mountains
- Plans family connections and educational events on family and/or business-related topics
- Communicates effectively/disagrees well
- Navigates the perils and privileges of wealth transfer



Delaware Valley
FAMILY BUSINESS CENTER

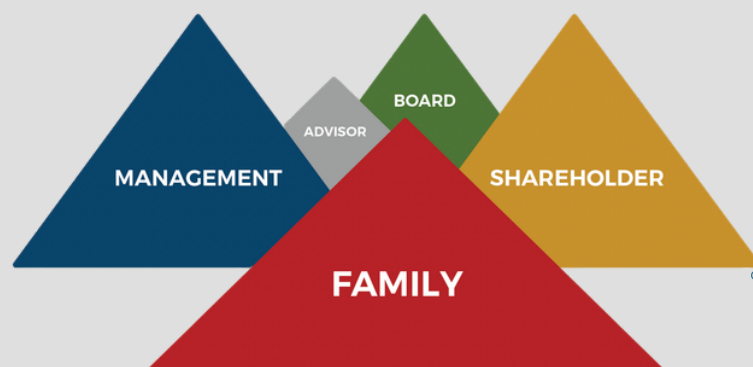
DVFBC.COM

You Climb. We Guide.

Contact us today and a 5 MOUNTAIN[®] Advisor/Coach will respond promptly to learn more about the goals of your family enterprise.

CALL US: 215-723-8413

EMAIL US: INFO@DVFBC.COM



Shareholder MOUNTAIN

The Gold Mountain Team holds primary stewardship responsibility over the other business Mountains. Successful shareholders are competent, committed, and aligned. As ownership evolves from founder to sibling partnership to cousin group, complexity increases and so does the need for informed collaboration.

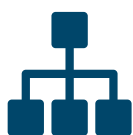
- “Speaks with one voice” about their Values & Vision for the company through a written Shareholder Covenant
- Selects Family and Independent directors for the Board who act on Policies on their behalf
- Oversees the preparation of Rising Generation Shareholders and selects the next-gen team



Board MOUNTAIN

The Green Mountain Team translates the Shareholders’ desired outcomes into business performance within the Management Mountain. The most effective boards combine Family and Independent directors.

- Provides necessary objectivity and perspective for business decisions
- Ensures Management operations within Shareholder expectations
- Reviews and approves company strategy and budgets proposed by Management
- Selects, supports, oversees, and holds the President/CEO accountable



Management MOUNTAIN

The Blue Mountain Team, led by the President/CEO, is responsible for communicating clear strategy, shaping a positive culture, and delivering on performance goals.

- Creates efficient systems/processes consistent with the values and vision developed by the Shareholders
- Creates strong accountability mechanisms starting with the President/CEO’s accountability to the Board of Directors



Advisor MOUNTAIN

Composed of professional advisors with various expertise and disciplines, The Gray Mountain offers deep, extensive experience to address issues arising within and between ALL the Mountains, especially in the “Transition Zone.”

- Provides mentoring, education, and counsel to the senior and rising generation before and during transitions
- In the later stages of transition, a Professional Advisory Council guides the family through the most complex issues
- Meets as a team, at least annually, to provide integrated, objective counsel for CEO/Board/Shareholders