



**Delaware Valley  
Family Business Center**  
*Helping Business Families Thrive*

**FAMILY BUSINESS FORUMS:**

Educational, interactive seminars designed for family firms where several generations of family members and non-family key executives learn “best practices” from each other and from business experts. Membership exceeds 80 family firms and includes:

- ◆ Initial Family Meeting Orientation
- ◆ *Primer for Business Families*
- ◆ Estate Planning Fire Drill
- ◆ Financial Scorecard
- ◆ Cash Management Evaluation  
(complete listing on the other side)

**NEXT GENERATION LEARNING LABS:**

Peer groups providing a proven **fast-track learning environment for successors**. Experienced facilitators guide the development of successors from non-competing businesses through **executive coaching, peer processing of real issues, and input from experts**.

**CONSULTING:**

Customized coaching and individualized assessments. Our **Family Business Strategic Planning Process** helps to strengthen family relationships while enhancing business performance in this generation and the next. Engagements may include Family Meeting Facilitation, Executive Team Development, Board Development; Successor Development, Compensation/Incentive Programs, and Succession Planning.

You're invited to the next ...

# Family Business Forum



## The Art of Letting Go & Letting Grow in Family Business Transitions

Wednesday, May 24, 2006

7:30 a.m. to 11:15 a.m.

*(includes breakfast buffet)*

**Indian Valley Country Club**

650 Bergey Road, Telford, PA



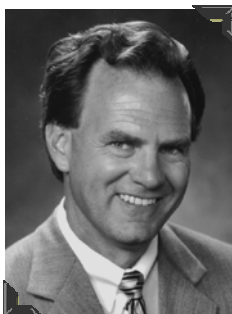
**Jo Anne Forman**  
President  
Sealstrip Corporation  
Boyertown, PA



**Heather Chandler**  
Executive Vice President  
Sealstrip Corporation  
Boyertown, PA



**Phil Clemens**  
3rd Generation  
Chairman & CEO  
The Clemens Family Corp.  
Hatfield, PA



**Steve Kendra**  
Former 2nd Gen President  
Precision Solutions, Inc.  
Quakertown, PA

**Join us to learn** how an entrepreneur and her daughter, a large multi-generational family firm, and a sibling partnership are negotiating the emotional “whitewaters” of family business transitions.

Management succession in family businesses is an art requiring growth and emotional elasticity in both generations. The challenge of the senior generation is not only to “let go” but also to “let themselves grow” as they prepare for the next meaningful stage of their life. Likewise, next generation leaders need to take responsibility for initiating their own development and even recommending the structure of the transition process.

The natural complexities of a family business “changing hands” often leads to confusion, frustration, and strained relationships. Both family relationships and business performance are at risk.

***How do families create a strong platform or a safe container to manage these challenges so both the business and family can thrive? Why is it so difficult for many seniors to “let go” of the baton?***

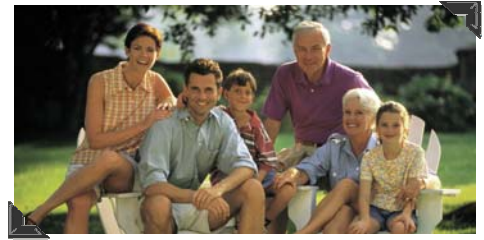
***What are the challenges of succeeding your father or mother? How can key senior executives support this transition? How do successors make their mark, initiating significant strategy, team or business system changes without “offending” family members? How does the next generation gracefully leave if the family business isn’t right for them?***

The discussion will also include the inner “work” many CEOs go through in the letting go process, the dangers of hanging on, and practical success tips for both generations on how to let go and let grow gracefully.

**FORUM PARTNERS:** Hamburg, Rubin, MMA Trust Kreischer Key Advisors National Penn Bank O’Neill Commerce Insurance  
Mullin, Maxwell & Lupin & Foundation Miller Group Member FDIC Employee Benefits Services

For more information, call Sally Derstine at Delaware Valley Family Business Center, (215) 723-8413.  
1011 Cathill Road, Sellersville, PA 18960 [sally@dvfambus.com](mailto:sally@dvfambus.com) [www.dvfambus.com](http://www.dvfambus.com)

# Forum Membership Application & Registration Form



## Take advantage of your Member Benefits!

**An Initial Family Meeting Orientation.** A confidential session with your family to clarify your objectives and introduce resources to help prepare your business family for another generation of success.

**Primer for Business Families.** A practical, how-to introductory booklet which provides a roadmap to help business families meet together to develop their OWN family business policies and plans.

**Quarterly Forum Meetings.** Learn from successful business families and experienced family business advisors. Member companies receive one FREE registration to EACH Forum.

**Next-Generation Learning Labs.** Forum companies are eligible for admission to a Next-Generation Learning Lab—facilitated successor peer groups which fast-track the growth and development of the next generation.

**Family Business Magazine sample.** Written exclusively for the owners and managers of family companies focusing on the tough issues virtually all business families must face.

**Family Business Advisor Newsletter.** Complimentary 3-month subscription.

**Membership Directory** which facilitates member-to-member interaction and learning about family business issues.

**SUCCESS IS  
NOT AN ACCIDENT ...  
SUCCESS FOR BUSINESS  
FAMILIES IS A CHOICE!**

## Membership also includes these complimentary services from our Forum Partners:

**Estate Planning Fire Drill.** A quick, concise process designed to identify and resolve problems associated with your untimely death, culminating in a valuable written report (*Jon Samel, Hamburg, Rubin, Mullin, Maxwell & Lupin; Chuck Creighton, Key Advisors Group*).

**Financial Scorecard.** A complete diagnostic review of your firm's important financial and operational indicators (*Mario Vicari, Kreischer Miller*).

**Philanthropy Review.** A quick review to determine if your legacy plan adequately reflects your values and desires (*Bill Hartman, Mennonite Foundation & MMA Trust Co.*).

**Cash Management Evaluation.** A review of your firm's current cash management program and follow-up recommendations which include pricing discounts available exclusively to Forum Members (*Ray Abbott, National Penn Bank*).

**Corporate Risk Audit.** A review of your property & casualty insurance program (*Mike Tiagwad, Commerce Insurance Services*).

**New Member Application.** Thanks to the generous support of our Partners, the annual membership fee is \$975.

Forum Registrations: I/we would like to register for the following Forum events:

- Wed., May 24, 2006 "The Art of Letting Go & Letting Grow"
- Wed., September 20, 2006 "Ownership Transfer"
- Wed., November 15, 2006 "The Passion, Power & Perils of Sibling Teams"

Name(s) \_\_\_\_\_

Business Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_ Website \_\_\_\_\_

**Please make check payable to:**

Delaware Valley Family Business Center, 1011 Cathill Road, Sellersville, PA 18960 USA

Total Member Registrations \_\_\_\_\_ x \$75 (less one FREE at each event) = \$ \_\_\_\_\_

If NEW Member, \$975 = \$ \_\_\_\_\_

TOTAL = \$ \_\_\_\_\_

Non-members may attend once with a guest registration of \$100.

Questions? Phone: (215) 723-8413 Fax: (215) 723-8351 E-mail: [sally@dvfambus.com](mailto:sally@dvfambus.com)

Cancellations must be made 2 days prior to event. The registration fee cannot be refunded or waived when cancellations are made after that date or when the registrant does not attend.