



**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
- ◆ Philanthropy Review
- ◆ Cash Management Evaluation
- ◆ Corporate Risk Audit
- ◆ Employee Benefits Benchmarking
(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



Ownership Transfer: How We Honored Both Generations and the Business

Wednesday
September 20, 2006

7:30 a.m. to 11:15 a.m.
(includes breakfast buffet)

Indian Valley Country Club, Telford



BRUBACHER
EXCAVATING, INC.

Ben Brubacher
Founder
Brubacher Excavating Inc.
Bowmansville, PA



BRUBACHER
EXCAVATING, INC.

Keith Brubacher
2nd Generation President
Brubacher Excavating Inc.
Bowmansville, PA



Don Silver
Former 3rd Generation
Owner/President
Penn Ventilators



SynaTek
The Turf Solutions People

Ken Clemmer
President
SynaTek
Souderton, PA

While many of our Forums address the critical process of developing next-generation leaders, this Forum explores the wide spectrum of **ownership transfer options for family businesses.**

Tax efficiency and the “fair share” values of estate planning are important considerations. However, ownership of a closely held family business is not an entitlement; it’s a choice for both generations! Ownership carries significant fiduciary responsibilities and should be limited to family members who have demonstrated the competence, commitment and alignment to be good stewards of these awesome responsibilities into the next generation.

Who initiates the ownership succession planning process...seniors or the next generation?

Who are the external professional advisors best suited to support ownership succession planning, the last and most difficult stage of the succession journey?

Join us to learn about the ownership transfer journeys of three different family businesses, how they made their decisions, and how the process has impacted the business and the family.

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

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, Kreisler 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*).

Employee Benefits Benchmarking. An assessment of your current employee benefits program (*John O'Neill, O'Neill Employee Benefits*).

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., September 20, 2006 "Ownership Transfer: How We Honored Both Generations AND the Business"

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 = \$ _____

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

TOTAL = \$ _____

Questions? Phone: (215) 723-8413 Fax: (215) 723-8351 E-mail: 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.