



THE FAMILY BUSINESS  
CONSULTING GROUP



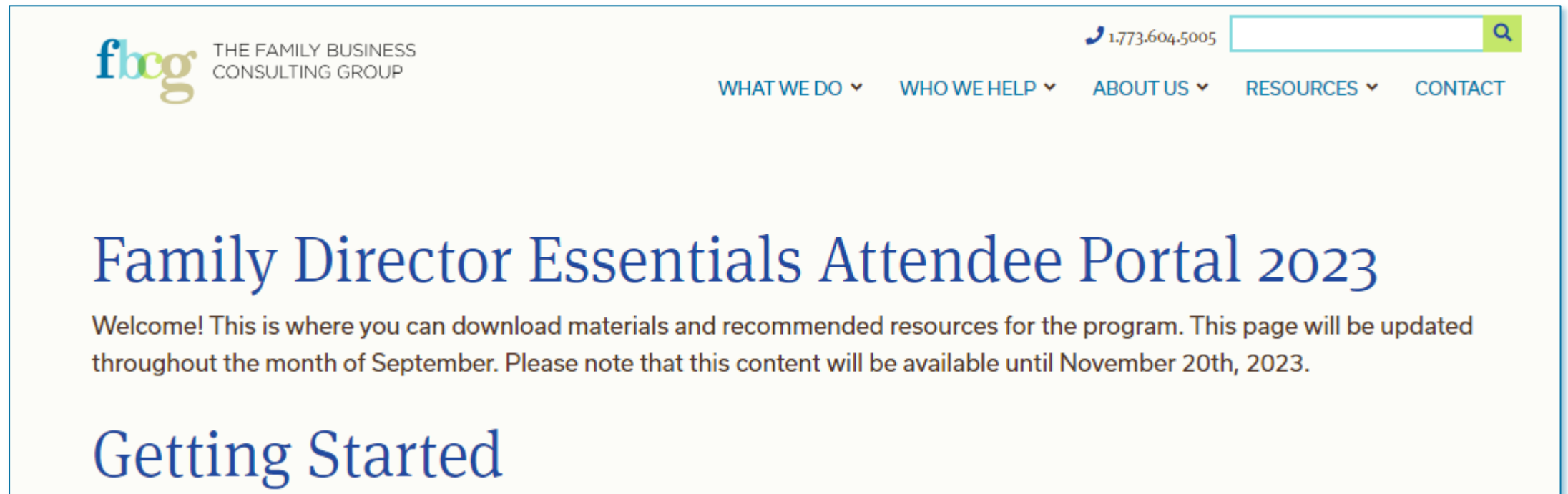
Welcome to Family Director Essentials  
*Supporting your growth, development & success!*

# Welcome!

Agape Redwood Rogers, Board Search Practice Lead  
Justin Albertson, Vice President, Client Services

# Access Your Materials Through the Private Portal

<https://www.thefbcg.com/family-director-essentials-attendee-portal-2023/>



The screenshot shows the homepage of the Family Director Essentials Attendee Portal 2023. At the top left is the fbcg logo with the text 'THE FAMILY BUSINESS CONSULTING GROUP'. To the right is a phone number '1.773.604.5005' and a search bar. Below the header is a navigation menu with links: 'WHAT WE DO', 'WHO WE HELP', 'ABOUT US', 'RESOURCES', and 'CONTACT'. The main heading is 'Family Director Essentials Attendee Portal 2023'. Below it is a welcome message: 'Welcome! This is where you can download materials and recommended resources for the program. This page will be updated throughout the month of September. Please note that this content will be available until November 20th, 2023.' At the bottom is a large heading 'Getting Started'.

**fbcg** THE FAMILY BUSINESS CONSULTING GROUP

1.773.604.5005

WHAT WE DO ▼ WHO WE HELP ▼ ABOUT US ▼ RESOURCES ▼ CONTACT

## Family Director Essentials Attendee Portal 2023

Welcome! This is where you can download materials and recommended resources for the program. This page will be updated throughout the month of September. Please note that this content will be available until November 20th, 2023.

## Getting Started

# Stay Engaged in Virtual Sessions

## What we have done

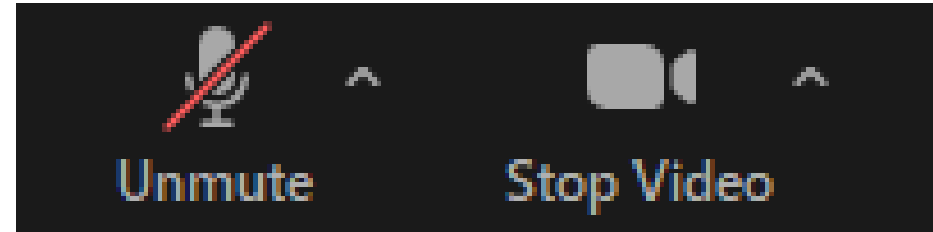
- Plenty of breaks
- Time for discussion and interaction
- Limiting length of sessions

## What you can do

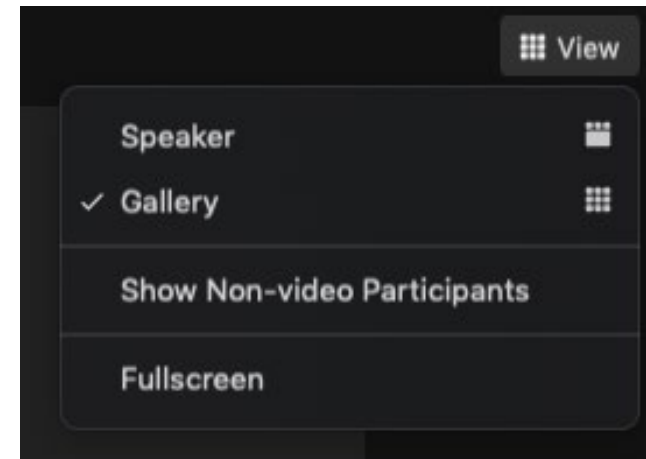
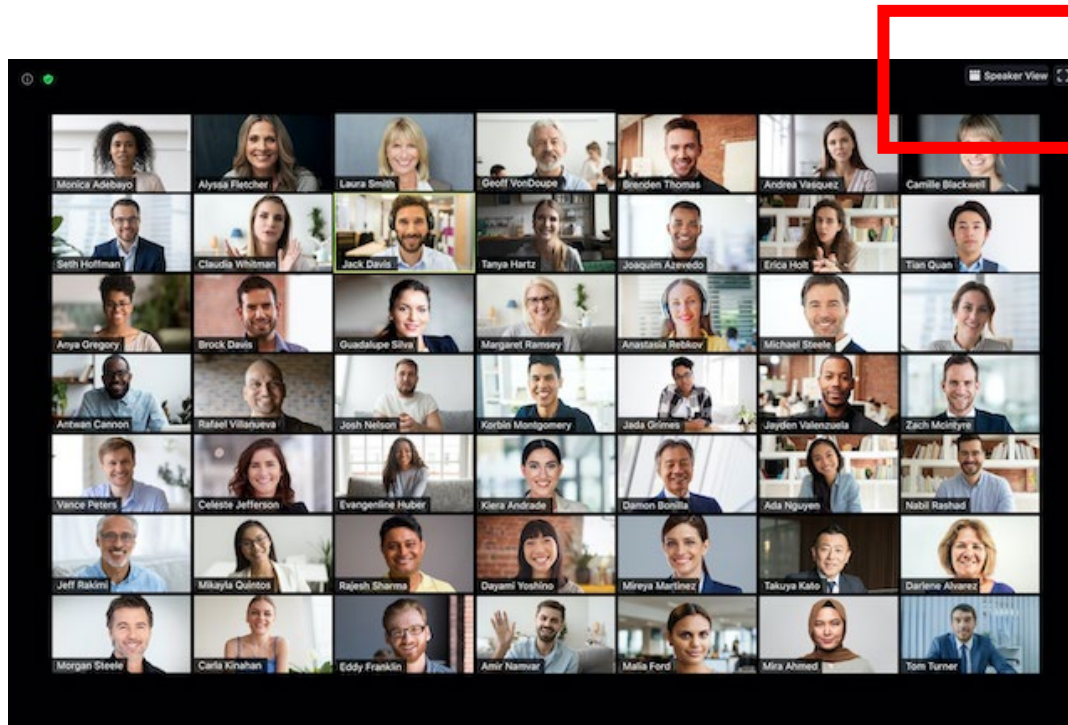
- Take movement breaks
- Stay hydrated
- Keep snacks on hand
- Use “fidgets”
- Take notes

# Zoom Tips & Tricks

- Muted when not speaking
- Start/Stop Video by your preference
- Cameras on during breakout discussions



# Zoom Tips & Participation



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We recommend **Speaker View**  
and **Hide Non-Video Participants**

Exit **Full Screen Mode** with ESC  
In some versions on Mac,  
use the “Meeting” menu option



# Participating in Discussions



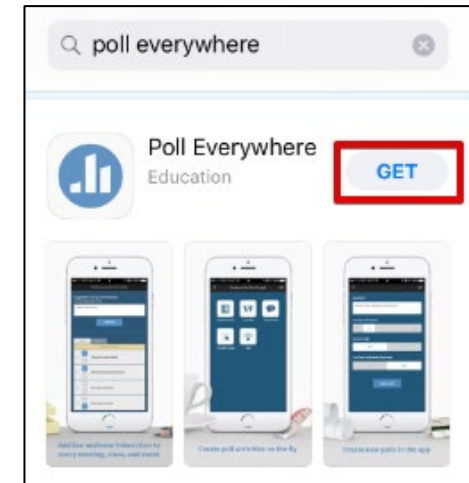
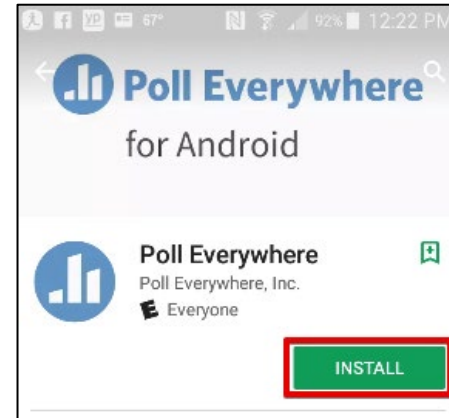
When asked to raise your hand to participate, open the “Reactions” pane



Share questions or comments at any time in the chat pane

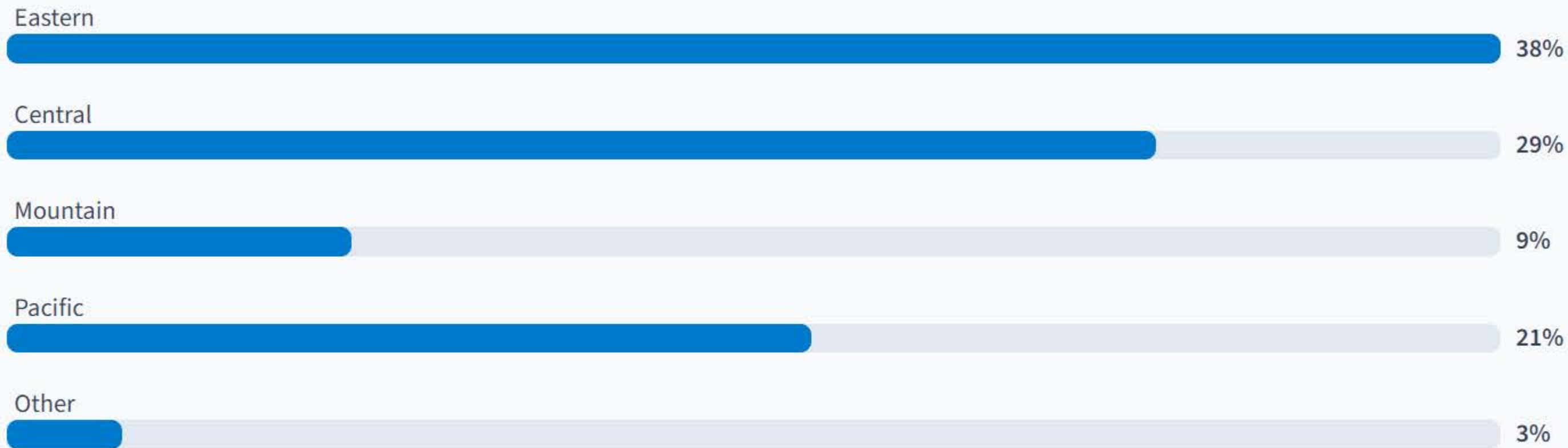
# Using the Poll Everywhere App

- Download the Poll Everywhere app via the Apple App store or Google Play Store
- Join our Poll Everywhere session: **thefbcg**

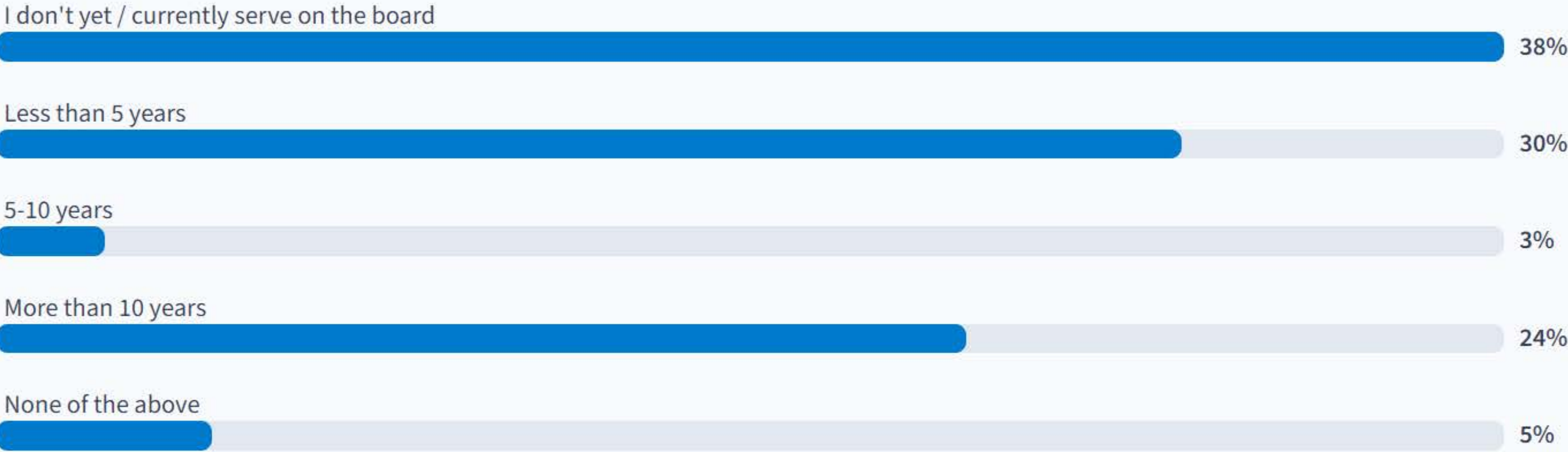




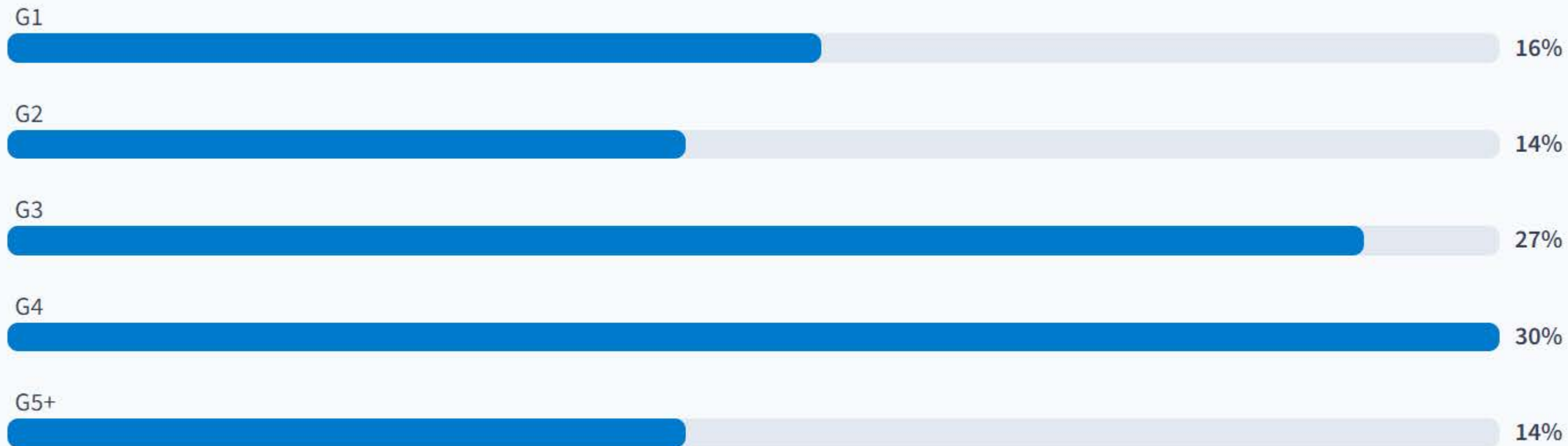
## What time zone are you in?



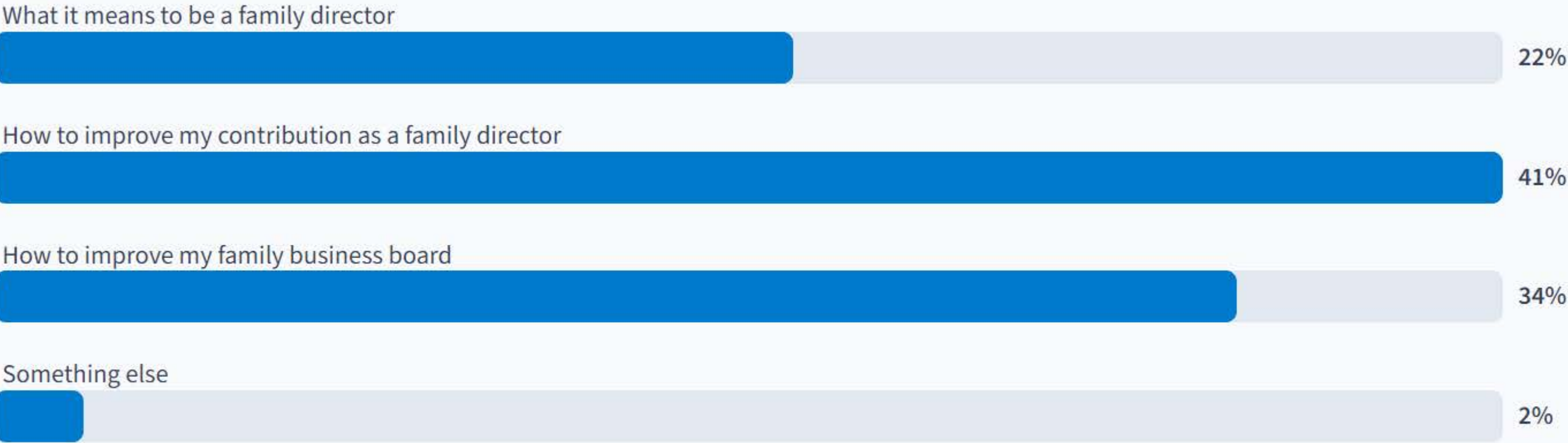
# How long have you served on your family business board?



## What generation are you in family business?



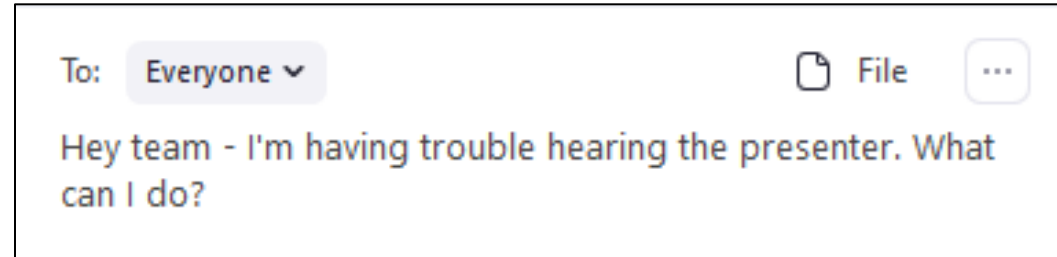
What do you most want to learn from the program?



# Technical Support

If you're having difficulty with the technology during the session, please do either of the following:

- Type a note in the Zoom chat or
- Email [sierra@thefbcg.com](mailto:sierra@thefbcg.com)





# About Us

We work with clients to manage the predictable and natural tensions between a family and a business through a unified vision for the future, and providing structures and processes for effective ownership, management, governance and family systems.

- Serving family enterprise since 1994
- 26 consultants located across North America
- Over 2,600 client families in 70 countries
- Deep academic and real-world expertise in strategy, management, finance, governance, psychology, leadership development, communication, conflict resolution, succession planning and family education.

# Our Core Belief

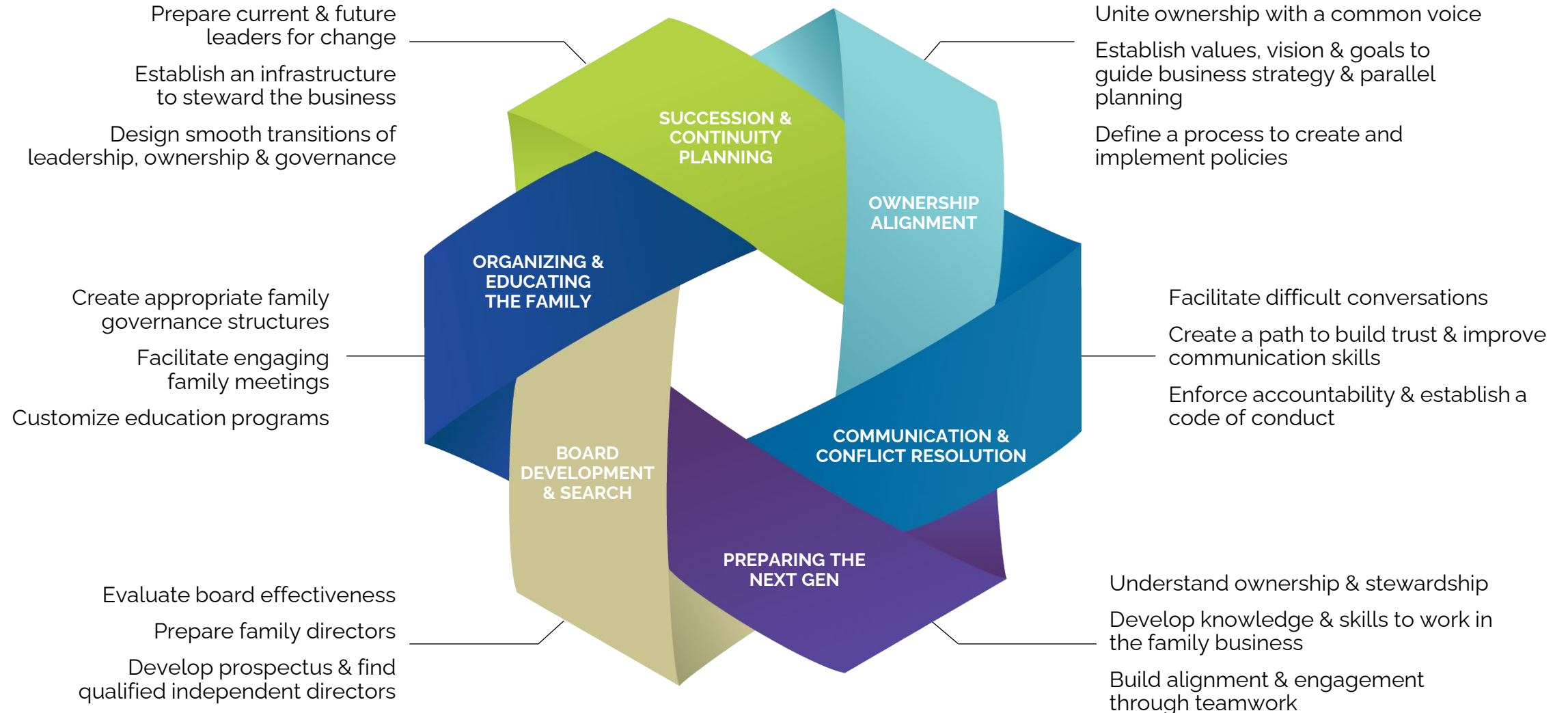
We believe that multi-generational family enterprises are precious and vitally important to the economies and social fabric of the world and deserve the best care and counsel.

We work to manage the predictable and natural tensions between a family and their business through a unified vision for the future, and providing structures, processes, strategies and policies for effective ownership, management, and governance.





# Our Solutions



# On Confidentiality

We honor confidences for the families we serve and that participate in our educational programs.

- Any information shared by the presenters is either an amalgam or fictionalization of their client work unless the family has authorized release of the information.
- Participants are asked to respect the confidentiality of their peers to foster an open dialogue.
- To allow for full value for participants, we will make recordings of the main sessions available for 30 days. Breakout Sessions will NOT be recorded.
- To protect the confidentiality of those who have participated in today's discussions, we ask that you do not share or retain recordings.

# Program Faculty



**Stephanie Brun de Pontet**

Principal Consultant

- Over 15 years experience advising enterprising families on governance and continuity planning
- Help families align on the structures and knowledge they will need as they move away from the owner-operator model
- Extensive experience supporting and guiding sibling and cousin teams in transition
- Co-author of the book *'Building a Successful Family Business Board'*



**David Karofsky**

Principal Consultant

- 25+ years of experience working with business families
- Focused on executing the transition of ownership and leadership, professional development, conflict resolution, strategic planning and forming governance structures
- Extensive experience working with adult siblings pairs and cousin dynamics in family businesses
- Co-author of *So You're in the Family Business: A Guide to Sustainability*

# Facilitators



**Marti Beltz**

Consultant

- 30 years experience in Organizational Development and Family Dynamics
- Extensive consulting in Strategic Planning and Process Design, specializing in the family enterprise
- Strong expertise and experience in Assessing and Developing Next Gen Leaders and Family Boards
- Focus, Alignment, and Support through Multi-Generational Transitions: business and family in parallel



**Kate Barnwell**

Consultant

- 10+ years of experience as non-family leader serving a family enterprise
- Guides families in governance evolution to support their goals for ownership continuity
- Strong background documenting decision-making practices in in governance agreements