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QUARTERLY MEMBERS BREAKFAST

SUCCESSION WINS & WOES: *Three Conversations about Transitions in the Family Business*

Business transition is one of the most challenging issues for a family-owned business. Second to growing the business, having a successful succession plan keeps most CEOs up at night. While 30% of family businesses successfully transition to the second generation, just 10-15% survive to the third generation and only 3-5% make it to the fourth generation.

Studies show nearly 65% of businesses will transition ownership or leadership in the next five years. Now more than ever it is important to understand the tools and rally the team to help you map out a strategy. And “hoping it all works out” is not a viable strategy. Join IFBE along with experts from **Brown Brothers Harriman** for three conversations about transitions in family business.

MEET THE EXPERTS



KEN BAKER
CEO | 2nd Generation
NewAge Industries



RESHMA MOORTHY
CEO | 2nd Generation
Frontier Technologies



DAVID J. FRIEDMAN
Founder & CEO | 1st Generation
High Performing Culture LLC

WHO SHOULD ATTEND?

First Generation CEOs • Owners
Founders & Spouses • Franchisees
Family Members in Management
Shareholders • Next Generation Leaders
Wealth Management Professionals • Small
Business Consultants



LEARN ABOUT DIFFERENT TYPES OF FAMILY BUSINESS TRANSITIONS, INCLUDING:

- ◆ How to successfully think through and approach the sale of your family business
- ◆ When it's not the right time to sell your family business
- ◆ What it looks like when you sell your business and the steps to take to ensure its legacy

THURSDAY, FEBRUARY 22, 2018

TIME:
8:00 -10:30 a.m.

LOCATION:
Saint Joseph's University
Mandeville Hall
5600 City Avenue
Philadelphia

NO COST for current Members
& Partners

NON-MEMBERS: \$40 per person

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