

## BAKER | NEWMAN NOYES

Certified Public Accountants

Baker Newman Noyes is a regional professional services firm with offices in Manchester and Portsmouth, New Hampshire and Portland, Maine. We offer comprehensive Accounting, Tax and Audit services as well as Healthcare Management and Information Technology Consulting to businesses and individuals in the Northeastern United States.

We serve a variety of clients including healthcare providers, financial service companies, public sector entities, not-for-profit organizations, manufacturers and distributors and high wealth individuals and families. Family owned businesses is an important part of what we do. Call Joe Lovejoy at (800) 244-7444 or visit [www.bnncpa.com](http://www.bnncpa.com) for information about how we can help you.

## TD&A

Thomas D. Davidow & Associates

Thomas D. Davidow, Ed.D., founder of **Thomas D. Davidow Associates** and **Genus Resources**, pioneered the interdisciplinary approach to family business consulting. He created a methodology to address family issues that typically interfere with sound business decision making. Joining Tom is Dr. Cynthia Adams Harrison who specializes in succession planning and executive coaching for family and nonfamily executives in the family business and the family office. She has also been recognized for her work with Olympic and professional athletes. For more information visit [www.TDavidow.com](http://www.TDavidow.com) or call Tom at (617) 739-2868 or Cynthia at (617) 347-4947.



**MassMutual Financial Group** - Committed to helping family businesses succeed for generations. MassMutual offers the life insurance and financial management services that families need to keep their businesses and hard-earned assets where they belong: in the family. Ed Mullen and Andy Lee have been sponsors of our center since 1993. For more information please contact Ed Mullen (603) 226-4124 or Andy Lee (978) 369-9835.

## PIERCE ATWOOD

ATTORNEYS AT LAW

Pierce Atwood has provided legal services to family businesses since 1891. Family-owned and closely held businesses throughout New England turn to Pierce Atwood for advice wherever the needs of the business entity and

family members intersect, from organizational structure and succession planning to taxation, employment matters, and estate planning. With more than 125 lawyers, Pierce Atwood is the largest law firm north of Boston. For more information, please contact Wilfred L. "Jack" Sanders, Jr. at (603) 433-6300 or visit [www.pierceatwood.com](http://www.pierceatwood.com).

## MPI

MANAGEMENT  
PLANNING, INC.

**Management Planning, Inc.** ("MPI") is a business valuation and corporate finance firm with a long tradition of serving family businesses. For almost 70 years, MPI has valued companies across a broad spectrum of industries to meet the corporate, succession planning, financial accounting, and estate and gift tax needs of its clients. Our professional services are widely acknowledged for their accuracy, thoroughness, and reliability. We provide expert testimony and support services when necessary. This has led to the building of long-term relationships with business owners, their families, and advisors. To discuss how we might help with your specific needs, please call Jeremy Weir in Boston at (617) 482-6462, or Bill Cranshaw in Hartford at (860) 651-8185, or visit our website at [www.mpival.com](http://www.mpival.com).



**Ocean Bank** is a full-service commercial community bank committed to serving the needs of small businesses and family-owned businesses, with retail banking services supporting business owners and individuals seeking a comprehensive financial relationship. Complete financial solutions delivered locally. Ocean is headquartered in Portsmouth, NH, maintains 40 branches and \$2.0 billion in assets. The bank is well positioned to meet the needs of entrepreneurial families working together in New Hampshire and southern Maine. For more information about the bank and its services, please visit [www.eOcean.com](http://www.eOcean.com) or call Kim Davis, Senior VP Commercial Banking, (603) 334-6703, or Ron Covey, Executive VP Commercial Banking, (603) 621-5828. At Ocean Bank everything starts with you.

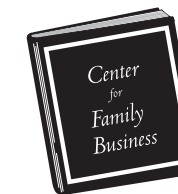


UNIVERSITY of NEW HAMPSHIRE  
WHITTEMORE SCHOOL OF BUSINESS AND ECONOMICS  
AND THE GRADUATE SCHOOL

Center for Family Business  
University of New Hampshire  
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## Center for Family Business

*Where family businesses plan for the future.*

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Program Calendar

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2008-2009

[www.familybusiness.unh.edu](http://www.familybusiness.unh.edu)

THE CENTER FOR FAMILY BUSINESS is a membership program designed to help families maintain a growing, healthy, and profitable company; prepare for new ownership and leadership; improve communication; develop strategies; overcome challenges; and meet interesting and successful family business owners.

FAMILY BUSINESSES, which offer great opportunities, rewards and unique challenges, are a vital part of the economy, especially in New Hampshire. Helping your family and business succeed and prosper, generation after generation, is the goal of the Center for Family Business.

THURSDAY, OCTOBER 16, 2008

**“How We Lead Matters”  
Reflections on a life of leadership**

*Location: UNH Huddleston Hall, Durham, NH*

Our featured speaker will be Marilyn Carlson Nelson, Chairman of the Carlson Companies, one of the largest privately held companies in the world providing travel, hotels, restaurants, cruise, and marketing services. Carlson brands include Radisson, Park Plaza, Wagonlit Travel, T.G.I. Friday’s, Seven Seas Travel, Country Inns & Suites... With headquarters in Minneapolis, Carlson-owned and franchised operations employ nearly 200,000 people in more than 150 countries.

Marilyn has been listed by Forbes magazine as one of the “World’s Most Powerful Women” and by *US News and World Report* as one of “America’s Best Leaders.” Under her leadership sales have tripled and Carlson Companies has become known as one of the best companies to work for. Her motto is “Never forget that your role as a leader is to be a steward for future generations.”

Marilyn’s father founded Carlson as Gold Bond Stamp Company in 1938. Though large, Carlson companies still share the same family business issues as you. Marilyn will share with you the challenges and obstacles she has overcome:

- Proving to her father that women belonged in business
- Changing the company culture to value and respect employees
- Dealing with family strengths, weaknesses, and tragedies
- Appointing the company’s first non-family CEO

Marilyn Carlson Nelson is also an author on leadership. A copy of her book *How We Lead Matters*, being released this fall, will be included for families who pre-register. Seating is limited so reserve seats for the whole family soon.

WEDNESDAY, NOVEMBER 19, 2008

**“The Strategic Planning Process for the Family Businesses”  
How to do it – why it is important.**

*Location: New Hampshire Distributors, Concord, NH*

The basic goal of any strategic planning process is to answer three primary questions: Who are we? What do we want to be? How do we get there?

This hands-on session will explore the process, steps and benefits of strategic planning for family-owned businesses. The goal is to help you build a strategic plan that is compatible with your family plan. By developing a strategic plan you can:

All sessions are interactive and include ample time for family discussion of the topics presented. Whenever possible family businesses are featured on the programs. More details about each program and the participants are circulated before each program.

- Make a plan for the future that reflects your values and purpose
- Improve strategic thinking in the firm
- Improve teamwork and information sharing within your business
- Better manage change
- Explore your competitive advantage
- Gain employee commitment

WEDNESDAY, MARCH 11, 2009

**“Governance in the Family Business - Boards of Directors and Advisory Boards - Which one will work best for you?”**

*Location: The Yard Restaurant, Manchester, NH*

Governance of a family business is an important cornerstone in the functioning of the business. The fundamental question is, what kind of governance structure will work best for your company? Family businesses have come to recognize the value of getting advice (feedback) from outside their own company and family.

This session will explore the legal, governance, and interpersonal issues of boards and help you answer these questions:

1. What best suits your company—Board of Directors made up of family members only, Board of Directors that includes one or more directors from outside the company, or Board of Advisors? What is the difference?
2. How to find and compensate board members?
3. What is involved in setting up each of these boards?

WEDNESDAY, APRIL 15, 2009

**“Impact of Letting Go”**

*Location: Lake Opechee Conference Center, Laconia NH*

**Okay, Now What!! I am transferring my ownership and responsibilities to the next generation.**

This session will explore the impact not only on persons leaving but how it effects the next generation and the employees. Learn what other prominent senior generation owners are doing and what tools they are using to deal with their succession issues. Planning ahead and making decisions today

will help both generations move into their new positions in the company more successfully and make the transition easier for the family and the employees.

We will look at the challenges the new generation faces in the day-to-day operations and how the senior generation can provide guidance. Several family business expert advisors will help lead the discussion and there will be ample time for questions. This is a unique opportunity for all family members to learn from experienced family owners how to use planning to handle the developmental issues in the succession process and how to move to the next phase of their lives and the business.

WEDNESDAY, MAY 20, 2009

**“Decision Making in the Family Business”  
An interactive discussion of the importance of the decision making process in a family business.**

*Location: UNH Browne Center, Interactive Learning Center, Durham*

This program will examine ways families who work together currently make decisions and explore new decision-making processes. To kick off the morning, families will participate in interactive, fun, and thoughtful exercises facilitated by the Browne Center with the goal of helping teams work more effectively with each other.

Because families in business are closely linked both economically and socially, it is important that the decision-making process reflect the goals of the company and as well as the family’s values. Often decisions are not based on facts but attitudes, perceptions and emotions.

Decisions that effect the business future are important to all family members. The decision-making process becomes even more important when one generation is shifting control to the next generation. Seeking both generations’ opinions, factoring them into a final decision, and communicating (explaining) the decision to all is crucial.

Join families for a lively discussion as they explore the four decision-making methods: autocratic, democratic, consensus and collaborative. Families will determine what kind of decision process works best for different types of decisions. Participants will walk away with an understanding of how to implement the most effective decision-making process for their family.

*Times for All Programs—*

8:00-8:30 A.M. Registration and coffee  
8:30-NOON Program; followed by lunch and networking

MEMBERSHIP APPLICATION FORM

OTHER FAMILY MEMBERS IN BUSINESS

TITLE

COMPANY NAME(S)

ADDRESS

CITY

STATE ZIP CODE

TELEPHONE

NUMBER OF EMPLOYEES

E-MAIL ADDRESS

Membership fee enclosed (\$1,250)

Please return form and fee to Center for Family Business, University of New Hampshire, Verrette House, 6 Garrison Avenue, Durham, NH 03824-3547