The UNH Center for Family Business is a membership program designed to help family-owned businesses navigate the unique challenges they face when families work together while, at the same time, they try to maintain a healthy and happy family relationship. The program provides an opportunity for families to network with, and learn from, other family-owned businesses. The program focuses on improving leadership skills, transferring ownership to the next generation, developing good communication skills, navigating through business challenges, and resolving conflict. The University of New Hampshire, along with our members and strategic partners, recognize that family businesses are a vital part of the New Hampshire economy and the Center is a resource to help them be successful and prosper from generation to generation. Annual membership fee is $1250 for the whole family. Contact Barbara Draper at (603) 862-1107 for more information.

Wednesday, December 2, 2015
Deterring and Detecting Fraud: A Discussion of Financial and IT Controls

Location: The Common Man, Concord, NH
Time: 8:00-8:30 a.m., registration and coffee
9:30-noon: program, lunch and networking

No family business ever thinks its employees would steal from them but it happens everyday. The CEO of a well known New Hampshire company will share how a trusted 20+ year employee embezzled more than half a million dollars from his company.

Have you thought about what would happen if someone hacked into your organization’s system? What data is at risk? Do you have controls in place that would mitigate this risk as well as risks associated with fraud and embezzlement?

This session will focus on cyber security, financial reporting, fraud and embezzlement risk, with recommendations for the detection and deterrence of such risks.

Actual case examples will be provided, along with specific controls/strategies that can be implemented in IT and finance to minimize fraud-related risk.

Wednesday, March 2, 2016
Do You Have Questions About Gifting, Buy-Sell Agreements or Business Valuations?

Location: The Derryfield Country Club, Manchester, NH
Time: 8:00-8:30 a.m., registration and coffee
9:30-noon: program, lunch and networking

This program will help you better understand these three key elements in a successful transfer of ownership of the family business. Ownership transfer may be achieved by gifts, sales, or a combination of both. This session will look more closely at lifetime gifts utilizing discounts and other techniques and will also address the passing of business interests at death or incapacity.

It will explain why almost every family owned business should have a buy-sell agreement, also called shareholders agreements, to ensure the continuity of the ownership and operation and the right questions to ask to successfully put one in place.

And finally we will look at business valuations with a focus on the importance of obtaining a high quality, defendable valuation for business and estate planning and ownership transition. We will discuss why the valuation is required, when it should be done and what you can expect during the project.

Wednesday, May 25, 2016
6th Annual Family Business Dinner
Manchester Country Club, Bedford, NH

Wednesday, May 11, 2016
The Challenges Facing Next Generation Leadership

Location: The Derryfield Country Club, Manchester, NH
Time: 8:00-8:30 a.m., registration and coffee
9:30 A.M.-12:30 P.M. program, lunch and networking

This program is designed to assist senior and next gen owners plan together for the future. It will empower the next generation by providing them with various tools of personal ownership: self-assessment, a values-based definition of success and career planning. For the senior generation, it will help them to convey the business issues they face to the next generation. The purpose of this workshop is to translate this awareness into a concrete personal action plan with the next generation.

As an author, educator, consultant and speaker, Greg McCann works with family enterprises in the areas of succession, communication, conflict resolution, gender issues, and with a special emphasis on helping the next generation succeed in both their careers and lives. McCann is the founder and director of the Family Enterprise Center at Stetson University.

Wednesday, October 7, 2015
Strategic Planning That Works for Family Businesses

Location: The Derryfield Country Club, Manchester, NH
Time: 8:00-8:30 a.m., registration and coffee
9:30-noon: program, lunch and networking

Family businesses manage operations that vary widely in scale, scope, and complexity. But they all can benefit from a strategic planning process that provides a structured way to discuss important long-term business and family issues. This workshop will show family business owners how to implement an easy 8-step process, and help them learn to use the process by working on a case study with other family business owners.

Thursday, November 19, 2015
Annual Combined CFB and CEO Forum—The Challenges Facing Next Generation Leadership

Location: Huddleston Hall, UNH Durham
Time: 8:00-8:30 a.m., coffee and networking
8:30-9:00 a.m., breakfast buffet
9:00-noon: program followed by lunch

E. Ritter & Co., founded as a farm in Arkansas in 1886, today is a $200M company in Arkansas and Tennessee with 350 employees operating in two distinct areas: agriculture and communications.

Currently, Ritter has approximately 45 family owners in the third, forth and fifth generations who are geographically dispersed across the United States. When the fifth generation came of age, no one stepped forward to work in the business. Many family members in their 20s and 30s still work in the business, but they had little idea of the company’s history and purpose. The lack of interest on the part of young family members troubled Dan, who was committed to maintaining the company as a family business for generations to come.

Dan will share the company’s journey to get the family more involved and how he established a family council and communications to discuss important long-term business and family issues. He will also discuss how he implemented a strategic planning process that provides a structured way to discuss important long-term business and family issues.

This workshop will show family business owners how to implement an easy 8-step process, and help them learn to use the process by working on a case study with other family business owners.

Lifetime Achievement Award recipients, Raymond Boissoneau and family, Electropac Co.
Baker Newman Noyes is known nationally as a leader in the accounting profession, with offices in Maine, Massachusetts and New Hampshire. We specialize in delivering audit and accounting, tax, and risk and business advisory services to family businesses. From succession planning, estate and gift tax planning techniques, to corporate and individual tax planning and compliance, we provide the guidance you need in all areas of accounting, taxation and business advisory. Helping family owned businesses thrive is an important part of what we do. Call Tim Hepburn or Jeff Wheeler at (800) 244-7444 or visit www摈bcpa.com for information about how we can help you.

MassMutual Financial Group is represented by family business specialist, Edward F Mullen, and Andrew D Lee. They are both highly experienced financial advisors and committed to assisting family businesses as demonstrated by their continuous sponsorship of the UNH Center for Family Business for over 20 years. Both Ed and Andy provide insurance and financial services to the family business to allow for the successful transfer of ownership and leadership to the next generation. For more information, contact Ed Mullen at (603) 226-4124 emullen@financialguide.com or Andy Lee at (978) 369-9835, alee@financialguide.com.

Optima Bank & Trust is a locally-owned, full-service community bank. The Morrisons set out to create a bank that would deliver a high level of customer service, the fastest local decision-making and the latest banking technology. Since Dan and Pam are involved in the bank’s day-to-day operations and management and the latest banking technology, they have the knowledge and ability to provide a great advantage to the bank’s customers. Optima Bank understands entrepreneurial families and small- and medium-sized businesses and recognizes that they are what make our communities great places to live and work. Optima is a true community bank and supports many non-profit organizations throughout the state.

Moitoza Consulting is a New Hampshire-based consulting firm serving small- to medium-size family enterprises and business partnerships in New England and beyond. Since over 25 years the firm has assisted these businesses with succession planning, conflict management, executive coaching, strategic planning and organizational development. Moitoza Consulting offers a pragmatic and personal level of planning and problem solving which honors both the needs of the business and the integrity of the family. The firm uniquely blends its expertise in contemporary business management and psychology into one consultation experience. For more information contact Everett Moitoza, Ed.D., M.B.A., at (603) 964-2111 or visit www.moitoza.com.

Management Planning, Inc. (“MPI”) is a business valuation and corporate finance firm with a long tradition of serving family businesses. For over 75 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 or email Elliot Rotstein at (617) 892-6078, erotstein@mpival.com or visit www.mpival.com.

Pierce Atwood advises family and closely-held businesses and their owners with respect to commercial matters, shareholder agreements and succession planning, among other matters. The firm has full-service branches in Bedford, Downtown Portsmouth, North Hampton, Pease Tradeport, Stratham and a loan office in Dover. To learn more visit www.pierceatwood.com or give Dan or Pam a call at (603) 433-9600.