PROGRAMS

WEDNESDAY, NOVEMBER 14, 2012

“Let’s Talk Compensation in the Family Business”

Presenters: Peter Chandler, CPA Baker; Newman, Noyes; Rob Ravenelle, Pierce Atwood LLP; Charles Schulz, Executive Pay Specialist

Location: Granite State College
25 Hall St., Concord, NH

Compensation for employees of family businesses can often be one of the most sensitive and complex issues that owners must manage.

How does the business appropriately compensate owner/employees, non-owner family members, and professional management so as to retain and incentivize them? Should the retiring generation be compensated after retirement?

This program will discuss the tools that can be used and the business and tax issues related to compensation including the use of bonus plans, deferred compensation arrangements and the various forms of equity and phantom equity as part of both on-going operations and business succession planning.

Joining the discussion for the first time will be executive pay specialist Charles Schulz from CFS Consulting that specializes in the development and implementation of total compensation systems for companies.

TUESDAY, FEBRUARY 5, 2013

The Key Issues in a Successful Family Business Succession

Presenter: Everett Moitoza, Ed.D., MBA
Moitoza Consulting
65 Regional Way, Concord, NH

In the lives of family businesses, the issues of succession and succession reigns supreme. While more is written about this area of family business than any other, it is often the most neglected area of activity (notice we didn’t say concern) by the typical family firm owner. The reasons are really quite simple – it is a daunting multiphase process that includes many personal and business related reasons are really quite simple – it is a daunting multiphase process that includes many personal and business related reasons.

This program focuses on developing leadership, transferring ownership to the next generation, developing good communication skills, navigating through the business challenges and resolving conflict. The University, our sponsors, and the members all recognize family businesses as a vital part of the economy and help to guarantee their success, prosperity and growth from generation to generation.

May 9, 2013

Come hear the story of Roedel family a successful multi-generation hotel owner/operator family.

Presenters: Fred B. Roedel founder of Roedel Companies and his family
Location: UNH Huddleston Hall
Durham, NH

Come hear the story of Roedel family a successful multi-generation hotel owner/operator family.

In 2000 Fred B. Roedel sold Chalet Susse International, which he founded in 1968 and grew to be the largest private hotel company in the Northeast. He then created the Roedel Companies with his sons. The Roedel Companies headquartered in Wilton, NH is an integrated hotel investment, construction and management company. In addition to owning and operating our own portfolio of hotels they provide essential hotel services to third party hotel owners and investors.

Fred most recently has transferred management control to his four children. Fred along with his two sons will share their experience in the hotel business and in a family business.

For more information about joining The Center for Family Business or to attend a program contact Barbara Draper, Center for Family Business, G13 Nesmith Hall, Durham, NH 03824-3593 or call (603) 862-1107, E-mail: Barbara.Draper@unh.edu.

www.familybusiness.unh.edu

ANNUAL MEMBERSHIP fee $1250 for THE WHOLE family.

WEDNESDAY, MARCH 27, 2013

“How Outstanding Leaders Understand and Manage Emotions”

Presenter: Dr. Vanessa Druskat, WSBE
Location: The Derryfield Country Club
625 Mammoth Rd. Manchester, NH

Emotion has a bad reputation in family businesses.

Just the word emotion conjures up pictures of disagreements and conflict. But, emotion is also at the root of the motivation, engagement, and pride that can increase the success of family businesses.

In this highly interactive program, we will discuss how outstanding leaders utilize emotional intelligence and their knowledge of emotion to build an emotionally resilient work culture that harnesses the power of positive emotions and that quickly bounces back from negative emotion.

Specific tools and approaches will be provided to help participants learn how to create a work culture that brings out constructive energy and emotion in both family and non-family members.

For more information about joining The Center for Family Business or to attend a program contact Barbara Draper, Center for Family Business, G13 Nesmith Hall, Durham, NH 03824-3593 or call (603) 862-1107, E-mail: Barbara.Draper@unh.edu.

www.familybusiness.unh.edu

ANNUAL MEMBERSHIP fee $1250 for THE WHOLE family.

WHAT OUR MEMBERS ARE SAYING:

“As we navigate the family business waters it is helpful to receive insight and suggestions from other business leaders who have experienced similar issues. I normally come away from a session with several new ideas. Having the wealth of experience and knowledge in the members to draw on is a great resource.”

Tom Brown, Chairman
New Hampshire Distributors

“As a member we have developed skills to communicate on a professional and personal level successfully. Our involvement as a family has been priceless, through the sponsors, we have resources available for guidance, other family businesses to network with and confide in, and the support of the university. Our family business has grown and branched. We credit much of that success to our membership.”

Michelle Dupont, Owner
Lake Opeechee Inn and Spa

“It’s lonely at the top. I found that my involvement in the Center has given me a place to learn and share my issues with my peers. It’s not so lonely anymore. I get to learn from some of the top family business owners in NH.”

David Green, CEO
Wire Belt Company of America
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 135 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.

MassMutual Financial Group has been 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 the UNH Center for Family Business since 1993. For more information visit www.massmutual.com or contact Ed Mullen at (603) 226-4124 or Andy Lee at (978) 369-9835.

Moitoza Consulting is a New Hampshire-based consulting firm serving small to medium size family enterprises and business partnerships in New England and beyond. For 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 call 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 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 or email Jeremy Weir in Boston at (617) 482-6462, jweir@mpival.com, or Bill Cranshaw in Hartford at (860) 651-8185, bcranshaw@mpival.com, or visit www.mpival.com.

Optima Bank & Trust is a locally owned commercial bank serving New Hampshire and Southern Maine. The Bank’s founders, Daniel and Pamela Morrison, set out to create a bank that would offer the latest banking technology and deliver an extraordinary level of personal service to its clients. Optima Bank’s local knowledge and ability to make decisions locally provides a great advantage to its clients. The 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 serves personal clients as well as businesses with offices in Portsmouth, North Hampton and Stratham. Please visit www.optimabank.com or give Dan or Pam a call at (603) 433-9600.

Baker Newman Novyes is known regionally and nationally as a leader in the accounting profession. With offices in Manchester and Portsmouth, New Hampshire, Portland, Maine, and Boston, Massachusetts, they offer expert accounting, auditing and tax services as well as healthcare management consulting, information technology consulting, and employee benefit services. They serve a variety of clients including high wealth individuals, families, healthcare providers, financial service companies, public sector entities, not-for-profit organizations, technology companies, manufacturers and distributors. Serving the needs of family owned businesses is an important part of what they do. Call Tim Hepburn at (800) 244-7444 or visit www.bnncpa.com for information about how they can help you.

Harvest Capital is a locally owned wealth advisor providing investment management, advanced planning, and family office services, to families, their businesses, and related endowments. Our particular interest is guiding families through the successful transition from owners/managers of closely held businesses to encore careers of passion and significance. We help clients prioritize their goals, invest with confidence, and coordinate all financial decisions. Our goal is to retain family wealth through multiple generations, which best preserves important family relationships. For more information call James Fitta, CFP, at (603) 224-6994 or visit www.harvestcap.com.

Optima Bank & Trust is a locally owned commercial bank serving New Hampshire and Southern Maine. The Bank’s founders, Daniel and Pamela Morrison, set out to create a bank that would offer the latest banking technology and deliver an extraordinary level of personal service to its clients. Optima Bank’s local knowledge and ability to make decisions locally provides a great advantage to its clients. The 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 serves personal clients as well as businesses with offices in Portsmouth, North Hampton and Stratham. Please visit www.optimabank.com or give Dan or Pam a call at (603) 433-9600.

Baker Newman Novyes is known regionally and nationally as a leader in the accounting profession. With offices in Manchester and Portsmouth, New Hampshire, Portland, Maine, and Boston, Massachusetts, they offer expert accounting, auditing and tax services as well as healthcare management consulting, information technology consulting, and employee benefit services. They serve a variety of clients including high wealth individuals, families, healthcare providers, financial service companies, public sector entities, not-for-profit organizations, technology companies, manufacturers and distributors. Serving the needs of family owned businesses is an important part of what they do. Call Tim Hepburn at (800) 244-7444 or visit www.bnncpa.com for information about how they can help you.

Harvest Capital is a locally owned wealth advisor providing investment management, advanced planning, and family office services, to families, their businesses, and related endowments. Our particular interest is guiding families through the successful transition from owners/managers of closely held businesses to encore careers of passion and significance. We help clients prioritize their goals, invest with confidence, and coordinate all financial decisions. Our goal is to retain family wealth through multiple generations, which best preserves important family relationships. For more information call James Fitta, CFP, at (603) 224-6994 or visit www.harvestcap.com.

The Center for Family Business is a membership program that assists family owned businesses as they navigate through the unique challenges families face working together, while maintaining a healthy and happy family relationship. It provides an opportunity for networking with and learning from other family businesses.