



**Delaware Valley  
Family Business Center**  
*Helping Business Families Thrive*

**FAMILY BUSINESS FORUMS:**

Educational, interactive seminars designed for family firms where several generations of family members and non-family key executives learn “best practices” from each other and from business experts. Membership exceeds 85 family firms and includes:

- ◆ Initial Family Meeting Orientation
- ◆ *Primer for Business Families*
- ◆ Estate Planning Fire Drill
- ◆ Financial Scorecard
- ◆ Cash Management Evaluation
- ◆ Risk Management Consultative Review (complete listing on the other side)

**NEXT GENERATION LEARNING LABS:**

Peer groups providing a proven **fast-track learning environment for successors**. Experienced facilitators guide the development of successors from non-competing businesses through **executive coaching, peer processing of real issues, and input from experts**.

**SUCCESSION PLANNING:**

**Customized coaching and individualized assessments**. Our **Family Business Strategic Planning Process** helps to strengthen family relationships while enhancing business performance in this generation and the next. Engagements may include Family Meeting Facilitation, Executive Team Development, Board Development; Successor Development, Compensation/Incentive Programs, and Succession Planning.

You're invited to our **Family Business Forum ...**

**Healthy Intergenerational Transitions:  
Applying the 7 Habits of Successful Successors**



**Wednesday**  
**March 28, 2007**  
7:30 a.m. to 11:15 a.m.  
(includes breakfast buffet)  
**Blue Bell Country Club, Blue Bell, PA**

**Dean R. Fowler, Ph.D.**  
**Dean Fowler Associates, Inc.**  
Brookfield, Wisconsin

“Back by popular demand, Dean Fowler returns to our Forum!

Family business succession certainly should honor the legacy of the founders or senior generations. But what about the emerging legacy of the next generation? **How can a business family build a legacy for the future that is consistent with the goals, passions and values of the next generation?**

Family members must balance four integrated areas of concern — their individual personal needs, their participation in the family, their role (whether active or inactive ) in the management of the business, and finally their responsibility as owners.

Using a case study in which a first generation family business completed a successful transition to the second generation (G2) sibling partnership, Dean Fowler will **present practical tools for implementing the dream of a family business legacy**.

Through the use of his “7 Habits of Highly Successful Successors,” Dean will **show us how to take action to implement a successful sibling team** in the next generation. The practical tools will be illustrated through this case study and put to action through small group break-out sessions.

One of the world’s leading family business experts, Dean has consulted with over 180 family businesses. His book—*Love, Power & Money: Family Business Between Generations*—has won world-wide acclaim in reviews in family business publications as one of the best books on integrated family business planning and development.



**~ Member “Best Practice” Highlight ~**

**How Our Outside Directors are Supporting Our Transition to the Third Generation** — John R. Wilkins, G2 Chair  
Delaware Valley Floral Group, Sewell, NJ



**FORUM PARTNERS:**

Hamburg, Rubin,  
Mullin, Maxwell & Lupin

Kreischer Miller

National Penn Bank  
Member FDIC

Commerce Banc  
Insurance Services

For more information, call Sally Derstine at Delaware Valley Family Business Center, (215) 723-8413.  
340 North Main Street, Telford, PA 18969 [sally@dvfambus.com](mailto:sally@dvfambus.com) [www.dvfambus.com](http://www.dvfambus.com)

# Forum Membership Application & Registration Form



## Take advantage of your Member Benefits!

**An Initial Family Meeting Orientation.** A confidential session with your family to clarify your objectives and introduce resources to help prepare your business family for another generation of success.

**Primer for Business Families.** A practical, how-to introductory booklet which provides a roadmap to help business families meet together to develop their OWN family business policies and plans.

**Quarterly Forum Meetings.** Learn from successful business families and experienced family business advisors. Member companies receive one FREE registration to EACH Forum.

**Next-Generation Learning Labs.** Forum companies are eligible for admission to a Next-Generation Learning Lab—facilitated successor peer groups which fast-track the growth and development of the next generation.

**Family Business Magazine.** Written exclusively for the owners and managers of family companies focusing on the tough issues virtually all business families must face. 25% subscription discount.

**Family Business Advisor Newsletter.** Complimentary 3-month subscription.

**Membership Directory** which facilitates member-to-member interaction and learning about family business issues.

**SUCCESS IS  
NOT AN ACCIDENT ...  
SUCCESS FOR BUSINESS  
FAMILIES IS A CHOICE!**

## Membership also includes these complimentary services from our Forum Partners:

**Estate Planning Fire Drill.** A quick, concise process designed to identify and resolve problems associated with your untimely death, culminating in a valuable written report (*Jon Samel, Hamburg, Rubin, Mullin, Maxwell & Lupin*).

**Financial Scorecard.** A complete diagnostic review of your firm's important financial and operational indicators (*Mario Vicari, Kreisler Miller*).

**Cash Management Evaluation.** A review of your firm's current cash management program and follow-up recommendations which include pricing discounts available exclusively to Forum Members (*Ray Abbott, National Penn Bank*).

**Risk Management Consultative Review.** A review of your property & casualty insurance program (*Mike Tiagwad, Commerce Insurance Services*).

**New Member Application.** Thanks to the generous support of our Partners, the annual membership fee is \$1,000.

Forum Registrations: I/we would like to register for the following Forum events:

Wed., March 28, 2007 "Healthy Intergenerational Transitions"

Wed., September 27, 2007 "When Your Parents Sign the Paychecks"

Thurs., May 24, 2007 "We Do What We Say"

Thurs., November 15, 2007 "Making Strategic Investments in Our Business Community"

Name(s) \_\_\_\_\_

Business Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_ Website \_\_\_\_\_

**Please make check payable to:**

Delaware Valley Family Business Center, 1011 Cathill Road, Sellersville, PA 18960 USA

Total Member Registrations \_\_\_\_\_ x \$75 (less one FREE at each event) = \$ \_\_\_\_\_

If NEW Member, \$1,000 = \$ \_\_\_\_\_

Non-members may attend once with a guest registration of \$100.

TOTAL = \$ \_\_\_\_\_

Questions? Phone: (215) 723-8413 Fax: (215) 723-8351 E-mail: [sally@dvfambus.com](mailto:sally@dvfambus.com)

Cancellations must be made 2 days prior to event. The registration fee cannot be refunded or waived when cancellations are made after that date or when the registrant does not attend.