MEMBER BENEFITS

ANNUAL MEMBERSHIP

As a Member of the Family Business Center, you’ll be part of a community willing to share its wisdom and knowledge in a supportive, confidential setting. More specifically, you’ll find the education and guidance you need. Our peer groups, conferences, webinars, programs, and institutes are all available to help preserve your family’s tradition and prepare a vision for the future.

Membership Benefits

- Introductory primer for the whole family on family business
- Participation in peer advisory groups (family members and non-family executives)
- Invitations to conferences, social events, and webinars
- Access to the nation’s largest family business resource library
- Annual family goal setting meeting
- Confidential, one-on-one coaching
- Subscription to the Family Business Center newsletter
- Advanced learning opportunities through our suite of family business institutes

ADDITIONAL WAYS TO GET INVOLVED

Peer Advisory Groups

Moderated by professional facilitators, these confidential forums provide a committed group of peers with the goal of shared growth as owners. Groups include 8-10 individuals and meet 6 times per year; family members and competitors are never placed in the same group.

Stewardship Institute

The Family Business Stewardship Institute prepares family business owners, shareholders, and stakeholders for effective stewardship of their family enterprise and for the significant transitions and decisions that must be made to determine the success and continuity of the family business.

Conferences and Events

Each year, the center hosts a number of events including webinars, conferences, social events, and our annual Illinois Family Business of the Year Awards. These are excellent ways for members to learn, network, build community, and celebrate family business.

Next Gen Leadership Institute

The Next Generation Leadership Institute prepares family business members for their unique leadership roles. Develop and practice your leadership style, create a lifetime development plan, and increase your effectiveness as a responsible family business leader.

Governance Institute

The Governance Institute is designed to help family boards strengthen their capabilities and effectiveness as well as prepare individual family members for board director positions.

<table>
<thead>
<tr>
<th></th>
<th>Annual Membership Dues</th>
<th>Annual Peer Advisory Group Membership</th>
<th>Governance Institute Tuition</th>
<th>Stewardship Institute Tuition</th>
<th>Next Gen Leadership Institute Tuition</th>
<th>Conferences, Webinars, and Events</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$7,500</td>
<td>$3,500</td>
<td>$18,500</td>
<td>$19,500</td>
<td>$20,000</td>
<td>Free-$350</td>
</tr>
</tbody>
</table>

CONTACT: Anne Smart  P · 312.915.7738  E · asmart@luc.edu  W · LUC.edu/fbc
DISCOVER THE LEADER WITHIN
The Next Generation Leadership Institute (NGLI) prepares family business members for their unique leadership roles. Participants develop and practice their leadership style, create a lifetime development plan, and increase their effectiveness as responsible family business leaders.

WHO THE CLASS IS FOR
The program is designed for 25-45 year-olds who are currently in managerial roles and on track to assume top leadership positions in their family business. Enrollment is open to members and non-members.

COACHING
Participants of are paired with their own career coach. Along with monthly on-campus group meetings, participants also meet monthly with their coach. Meetings are typically one hour long and scheduling is arranged and agreed upon by the participant and their coach.

OPENING RETREAT
The program kicks off with an opening retreat weekend (Fri-Sat) which includes in-class sessions and outdoor individual/team exercises. The retreat provides the opportunity for confidential conversations, group formation, and time to get to know your fellow peers.

YOUR COMMUNITY
Your community is composed of three parts. Peers act as a trusted, confidential cohort of friendship and support. Your coach will be a guide through your journey, helping you create a professional and personal development plan. And your facilitator will lead the group by exploring areas of self, family, and business, and how they relate to your leadership development.

JOIN THE NEXT CLASS
The Next Generation Leadership Institute kicks off every May.

CONTACT: Anne Smart  
P • 312.915.7738  
E • asmart@luc.edu  
W • LUC.edu/fbc

NEXT GENERATION LEADERSHIP INSTITUTE
LOYOLA UNIVERSITY CHICAGO • FAMILY BUSINESS CENTER

WHAT YOU’LL LEARN
Through hands-on activities and case studies, NGLI participants graduate with (1) a deeper understanding of their strengths (2) an awareness of areas that need improvement (3) a better understanding of their family culture and (4) a clearer vision for their business.

CURRICULUM
Unit 1 • Self
- Family Business Overview
- Setting Priorities
- Life Stages
- 360° Assessment
- Emotional Regulation
- Genograms

Unit 2 • Family
- Difficult Conversations
- Emotional Intelligence
- Drama Triangle
- Successor’s Challenge
- Family Culture
- Family Governance

Unit 3 • Business
- Family Strategy and Financials
- Team Management Systems
- Leading in a Crisis
- Leading Change

“I literally use the skills gained in NGLI every day and it’s not just at the office. I have changed as a person and that shows up in all aspects of my life. NGLI was transformational, genuine, and empowering.”

-Brian Richmond
Dawn Food Products
FAMILY BUSINESS STEWARDSHIP INSTITUTE

THE KEYS TO RESPONSIBLE STEWARDSHIP
The Family Business Stewardship Institute prepares family business owners, shareholders, and stakeholders (including non-owner spouses and future owners) for effective stewardship of their family enterprise and for the significant and sometimes unpredictable transitions and decisions that must be made to determine the success and continuity of the family business.

WHO THE CLASS IS FOR
Family business owners, shareholders, and stakeholders (including non-owner spouses and future owners) looking for ways to ensure effective stewardship of their family enterprise.

WHY YOU SHOULD JOIN
No other program out there offers this level of comprehensive family business education. Thought leaders, subject matter experts, and live case studies, along with confidential peer-to-peer learning, will help you develop a set of tools and resources to foster responsible and effective stewardship.

WHAT YOU’LL LEARN
The program’s comprehensive curriculum focuses on six key areas and how each plays a vital role in the health and success of your family business. You’re encouraged to apply what you learn in the classroom to your own business, measure the impact, and share the results with your peers.

YOUR COMMUNITY
Each class is a melting pot of family business CEOs, shareholders, family council members, non-family business employees, and managers. This trusted and confidential group will support you on your journey and help develop a family strategy for responsible ownership. Many participants stay in touch with each other after graduation.

JOIN THE NEXT CLASS
The Stewardship Institute kicks off every September.

CONTACT: Anne Smart  P • 312.915.7738  E • asmart@luc.edu  W • LUC.edu/fbc

PROGRAM DETAILS
18 Month Course
Quarterly Facilitated Meetings on Loyola’s Water Tower Campus
Experiential Learning
Comprehensive Curriculum with Peer Support
Taught by Expert Faculty
Immersive Classroom Environment
Guest Speakers and Subject Matter Experts
Live Case Studies

CURRICULUM

Unit 1 • Managing Relationships
- Understanding Yourself and Others
- Life Stages
- Family Dynamics and Genograms
- Difficult Conversations
- Family Cohesion
- Conflict and Conflict Resolution

Unit 2 • Governance
- Business and Ownership Governance
- Leadership and Accountability
- Implicit to Explicit Governance
- Models of Family Governance
- Creating a Governance Plan

Unit 3 • Leadership
- Defining Leadership
- Vision and Values
- Responsible Leadership
- Leadership and Team
- Managing Change
- Creating Accountability

Unit 4 • Finance
- Accounting and Financial Analysis
- Planning and Investments
- Business Exit Strategies

Unit 5 • Strategy
- Strategy Basics
- Risk and Resiliency
- Family Strategy
- Business Strategy
- Personal Strategy

Unit 6 • Transitions
- Keys to Transitions
- How Will You Measure Your Life
- Gratitude
- Defining Personal Success
- Working with Advisors

"FBSI has the ability to be transformative for participants. I personally felt the program strengthened my ability to help my family – and the structures already in place – grow and prepare for a healthy future together."

-Joe Edison
Sasser Family Holdings
BUILD THE BOARD OF YOUR DREAMS

The Governance Institute is designed to help family boards strengthen their capabilities and effectiveness as well as prepare individual family members for board director positions.

WHO THE CLASS IS FOR

The Governance Institute is designed for current/prospective board members who are part of a family business. Participants have a desire to become high functioning board members and develop or improve their own family business board. Open to both members and non-members.

FEATURING EXPERT FACULTY

Led by expert family business thought leaders, the institute’s comprehensive curriculum, peer support, and immersive classroom environment will help you take your board to the next level.

WHAT YOU’LL LEARN

You’ll look at the principles of family business governance and the interactions between family managers, board members, owners, and the CEO. Peer support, experiential learning, and an immersive classroom environment are what set this program apart and are the keys to helping you and your fellow classmates experience transformational change.

YOUR COMMUNITY

Learn alongside fellow family business members who are just as engaged as you in the development of their own board. Over time you’ll get to know more about them, their family and their business. Benchmark against your peers, share best practices, and take what you learn in class back to your own board.

PROGRAM DETAILS

- Board Simulation During Each of the Modules
- 18 Month Course
- Quarterly Facilitated Meetings on Loyola’s Water Tower Campus
- Experiential Learning
- Comprehensive Curriculum with Peer Support
- Taught by Expert Faculty
- Immersive Classroom Environment
- Mirrors Board Meeting Sequence
- Guest Speakers and Subject Matter Experts

CURRICULUM

Unit 1
- Board’s Role in Family Business System
- Legal Responsibilities
- Building the Board You Need
- Group Process: Human Bias
- Strategic Planning

Unit 2
- Board Recruiting and Orientation
- Capital Allocation and Budgeting
- Leadership and Committee Structures
- Running an Effective Meeting

Unit 3
- Board Succession Planning
- Executive Compensation
- Capital Allocation and Budgeting
- Driving Accountability

Unit 4
- Managing Risk
- Mergers and Acquisitions
- Board Evaluations and Goal Setting
- Confidentiality, Liability and Privilege
- Dividends and Reinvestment

Unit 5
- Developing Candor
- Challenging Effectively
- Role of the Chairman
- CEO Evaluations
- External Stakeholder Relations
- Importance of HR

Unit 6
- Advanced Board Strategy
- Financial Oversight
- Action Planning
- Importance of Facilitation
- Final Presentations

JOIN THE NEXT CLASS

The Governance Institute kicks off every July.

CONTACT: Anne Smart  P • 312.915.7738  E • asmart@luc.edu  W • LUC.edu/fbc

“This program has encouraged me to look at the role of the board more dynamically and from a higher level. Learning in a cohort is unique because we can watch as other businesses and families try out ideas and develop. Being engaged in each other’s experience and story makes the real-time learning all the more impactful.”

-Rebecca Peterson
Sasser Family Holdings
PEER ADVISORY GROUPS

LOYOLA UNIVERSITY CHICAGO • FAMILY BUSINESS CENTER

YOUR PERSONAL BOARD OF ADVISORS

Peer Advisory Groups meet to discuss family business subjects of mutual interest. Moderated by professional facilitators from the center, these confidential forums provide a committed group of peers with the goal of shared growth as owners.

HOW ARE GROUPS STRUCTURED

Peer groups are made up of 8-10 people. You will be assigned to a group based on your lifestage and your role within your business and/or family. Groups are responsible for defining their own learning goals and purpose. They meet an average of 6 times each year for approximately 4-6 hours. Dates, times, and locations are agreed upon by the group. As a rule, family members and competitors are never grouped together.

WHAT'S EXPECTED OF GROUP MEMBERS

Upon joining a group, you will be asked to make a minimum two-year commitment. Beyond this, you will be expected to participate in the co-creation of content (topics, ideas, concepts, etc.); remain open, honest and willing to share; and hold yourself and others accountable to the group's agreed upon meeting schedule.

WHAT'S THE ROLE OF MY FACILITATOR

Each peer group is moderated by a professionally trained and certified facilitator. Your facilitator’s primary role is to lead group meetings and hold you and your fellow peers accountable to each other. Your facilitator is also responsible for securing guest speakers, coordinating meeting logistics, and administering the group’s annual assessment survey. Lastly, you will meet one-on-one with your facilitator twice a year to discuss your group experience.

HOW IS THE CENTER INVOLVED

The Family Business Center oversees your facilitator as they serve your group; provides resources to your group such as reading materials, subject matter expert referrals, and best processes; compensates and offers continuing education to your facilitator; and offers administrative and structural support as needed.

JOIN A PEER GROUP

Submit a peer group application online at LUC.edu/fbc

CONTACT: Anne Smart  P • 312.915.7738  E • asmart@luc.edu  W • LUC.edu/fbc