

Family Business

THE GUIDE FOR
FAMILY COMPANIES

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to Family Businesses

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YORK ATHLETICS: A Family Business in Three Acts

The first business prospered for 30 years before succumbing to foreign competition. The second became a New Hampshire institution now considering a path to the future. The third launched in 2016 with a business plan to vie with some of the largest competitors in the world.

PLUS

- Recruiting council members
- Working with a financial adviser
- Accounting lessons for the next generation

From left: Kyle York, Evan York,
Don York, Travis York, Gail York,
Tyler York and Dylan York.

TRANSITIONS WEST 2016

November 9-11 | Pointe Hilton Tapatio Cliffs Resort | Phoenix, AZ

Conference offered advice on owner engagement



Transitions West 2016 drew 240 attendees, representing 76 business families.



Above: From left, Greg Waggoner, board member, Leupold & Stevens Inc.; Stacy Mello, senior director, planning and communication, A. Duda & Sons Inc.; Jerry Fat, president/CEO, Frank Fat Properties, Fat City Inc., Frank Fat Inc.; and moderator Scott Winget of Ascent Private Capital Management discussed family dynamics between active and inactive shareholders.

Left: Robert H. Rock, chairman, MLR Holdings LLC, and Elizabeth Bloch-Uhlmann, board member, Marion and Henry Bloch Foundation, spoke about Henry Bloch's decision to create the foundation, which supports organizations that serve Greater Kansas City, the hometown of H&R Block.



Attendees broke into small groups for expert briefings on family values, employment policies, taxes and estate planning, the next generation, personal security, wealth's impact on the family and dealing with family conflict.



From left: Don Freeman, chairman, Freeman; Christin Cardone McClave, chief people officer and board member, Cardone Industries; Sheldon G. Wittwer, chairman of the board, Wittwer Inc. and Wittwer Hospitality; and moderator Rhona Vogel of Vogel Consulting discussed 'The Mechanics of Ownership, Dividends and Liquidity.'



Transitions West 2016 closed with a keynote conversation between Brian France, chairman and CEO of NASCAR (left), and Peter Begalla of *Family Business Magazine*.



Jean-Charles Boisset, president of Boisset Family Estates, delivered a keynote address. His wines were served at the group dinner, held at the Wrigley Mansion.