

## PROGRAM AGENDA

11:00 – 11:45 AM	<b>Registration</b>
11:45 AM – 12:45 PM	<b>Welcome &amp; Lunch</b> An advisory-based overview centered around Northern Trust's approach to serving family businesses.
	<b>Speaker:</b> Mary Ann Sisco, <i>Director of Strategy and Innovation, PFS Advisory Services, Northern Trust</i>
12:45 – 1:00 PM	<b>Break</b>
1:00 – 2:15 PM	<b>Beyond Best Practices: The Art of Family Business Continuity</b> The formal study of family business is 25 years old. Professor Ward will reflect on what's been learned about family business success over this time period and propose how the most successful families have stretched those lessons into new insights. Those insights – the arts of continuity – will be examined and examples will be shared.
	<b>Speaker:</b> Professor John L. Ward, <i>Co-Director, Center for Family Enterprises, Kellogg School of Management, Northwestern University</i>
2:15 – 2:30 PM	<b>Break</b>
2:30 – 3:45 PM	<b>Strategic Renovation</b> How do next generation leaders revitalize strategically? What happens when the younger generation wants to make changes to which the older generation is resistant?
	<b>Moderator:</b> Professor Lloyd E. Shefsky, <i>Founder &amp; Co-Director, Center for Family Enterprises, Kellogg School of Management, Northwestern University</i>
	<b>Panelists:</b> <ul style="list-style-type: none"> <li>■ Andrew T. Berlin, <i>Chairman &amp; CEO, Berlin Packaging</i></li> <li>■ Wendy Carlson Nelson, <i>Member, Carlson Board of Directors</i></li> <li>■ Steve Don, <i>President &amp; CEO, Edward Don &amp; Company</i></li> <li>■ Stephen J. Goodenow, <i>Chairman &amp; CEO, Bank Midwest</i></li> <li>■ William A. Terlato, <i>CEO, Terlato Wine Group &amp; Terlato Wines International</i></li> </ul>
3:45 – 4:00 PM	<b>Break</b>
4:00 – 5:15 PM	<b>Non-Family CEO</b> How do you attract, retain and compensate non-family executives? How do you motivate teams to accept/assist? How do you introduce them to your culture?
	<b>Moderator:</b> Professor Lloyd E. Shefsky, <i>Founder &amp; Co-Director, Center for Family Enterprises, Kellogg School of Management, Northwestern University</i>
	<b>Panelists:</b> <ul style="list-style-type: none"> <li>■ Jim James, <i>Vice Chairman &amp; CEO, IDEAL INDUSTRIES, INC.</i> (non-family member)</li> <li>■ David W. Juday, <i>Chairman, IDEAL INDUSTRIES, INC.</i> (family member)</li> <li>■ Theodore F. Perlman, <i>Chairman, The HAVI Group, LP</i> (family member)</li> <li>■ Russ Smyth, <i>CEO, The HAVI Group, LP</i> (non-family member)</li> <li>■ Stuart Thorn, <i>President &amp; CEO, Southwire Company</i> (non-family member)</li> </ul>

# 2012 Family Business Invitational Conference

## PROGRAM AGENDA (CONTINUED)

5:15 – 6:30 PM *Networking/Cocktails* (Northern Trust, first floor lobby/art gallery)  
6:30 – 9:00 PM *Dinner* (sixth floor /Assembly Room)  
**Our Three-Generation Experience**

### Keynote Speaker:



Andrew C. Taylor  
*Chairman & CEO*  
*Enterprise Holdings*

## REGISTRATION

Please visit [northerntrust.com/familybusinessconference](http://northerntrust.com/familybusinessconference) to register for the complimentary conference by **Friday, October 5, 2012**. All other expenses including airfare, hotel, ground transportation and other activities are the responsibility of the attendee. Pre- and post-activities can be arranged by calling the concierge at the Hotel Allegro.

## HOTEL RESERVATIONS

### Hotel Allegro

171 W. Randolph Street

Chicago, Illinois

- Room rate: \$219 single/double per night, plus 16.39% tax
- Call the reservations department at **312-325-7211 or 800-KIMPTON**
- Reference the Family Business Conference
- Please book reservations no later than **Monday, September 24, 2012**

## WEATHER

The climate in Chicago during October ranges from average daytime temperatures in the upper 50s to low 60s with evening temperatures in the mid 40s. Visit [weather.com](http://weather.com) for an up-to-date weather forecast.

## ATTIRE

Business casual attire is appropriate for the conference and dinner.

## PARKING

Hosted parking will be available at System Parking – 181 West Monroe Street.

*Please bring your parking ticket to be validated at the conference.*

## CANCELLATION OR QUESTIONS

Should your plans change or if you have any questions or special needs (including medical or dietary restrictions) please contact Danielle Czyz at 312-630-1641 or [dc74@ntrs.com](mailto:dc74@ntrs.com). Contact the Hotel Allegro directly to cancel your hotel reservation.