

# 17<sup>TH</sup> ANNUAL FAMILY BUSINESS FORUM

*Grow your business and strengthen your family relationships  
Learn how from successful business families and leading experts*



*Now in its 17th year, the Forum is a friendly environment in which to meet  
other families, discuss live cases and learn together  
(family business speakers in order of appearance):*

*Ms. Bella Hoare, C. Hoare & Co. (United Kingdom)  
Family Speaker - Lessons from One Family's Governance Story  
Mr. Rafiq Habib, House of Habib (Pakistan)  
Mr. Alan Hassenfeld, Hasbro, Inc. (United States)  
Ms. Bruna Lambais, Manserv (Brazil)  
Ms. Margaret-Jean Mannix, Loram 99 Corporation (Canada)*

*Mr. Peter Leach, Imperial College London  
Author of "Family Enterprises, The Essentials" (United Kingdom)  
Prof. Denise Kenyon-Rouvinez, IMD Business School  
Author of "Governance in Family Enterprises: Maximizing Economic & Emotional Success"*

*The Dorchester Hotel, London  
Wednesday–Friday, 10–12 May, 2017*

**WEDNESDAY**  
**10 MAY, 2017**

The Family Business Forum is designed exclusively for family members with major family firms or family offices. In today's sessions, you will hear from and work with families from every continent, discussing genuine situations in table-sized groups.

## **FAMILY, BUSINESS AND OWNERSHIP**



### **Challenges and Potential Solutions – An Introduction**

**Mr. Peter Leach** (United Kingdom)

Adjunct Professor in Family Business, Imperial College London

Author "Family Businesses, The Essentials"

Partner, Deloitte Global Leader – Family Enterprise Consulting, Deloitte LLP

One of the world's leading teachers, writers and consultants on family business, Peter Leach has worked with hundreds of business families across the world. On the first and third day, Peter will facilitate discussions, draw conclusions and contribute his own presentations. His opening session will introduce several key concepts that will be addressed in more detail by the family speakers.

## **LESSONS LEARNED OVER ELEVEN GENERATIONS**



FOUNDER:  
SIR RICHARD HOARE \*

*\*Reproduced with thanks to the National Trust*



11<sup>TH</sup> GENERATION:  
BELLA HOARE

### **Implicit Rules and Necessary Compromises**

**Ms. Bella Hoare** (United Kingdom)

11th Generation Family Member and Managing Partner, C. Hoare & Co.

C. Hoare & Co. was founded by Sir Richard Hoare in 1672. Well over 300 years later, it remains 100% owned by the Hoare family and is led by direct descendants of the bank's founder.

During its long history, C. Hoare & Co. has enjoyed successes and survived many crises. 11th generation family member and Managing Partner Bella Hoare will show how the company owes much of its longevity to key decisions made in the early years. These include clarifying family values, creating implicit or explicit rules and being willing to accept certain compromises in exchange for long-term success. Bella will be joined by a family member who has recently joined the firm, bringing a next generation perspective.

## **FAMILY AND BUSINESS GOVERNANCE**



FAMILY BUSINESS GOVERNANCE:  
FITTING THE PIECES TOGETHER

### **Lessons from One Family's Governance Story**

A family leader will discuss his family's process to create a comprehensive family and business governance system. The story began with the realisation that the family was vulnerable to potential conflicts because common rules and a vision for the future had only been partially agreed.

Over several years, with external advice, the family went through a piece-by-piece process to put together a collective vision, family constitution and governance system, including a family council. Family members also became used to speaking up and disagreeing on difficult topics before finding common ground together.

## **LIVE CASE IN TABLE-SIZED GROUPS – THE HOUSE OF HABIB, PAKISTAN**



RAFIQ HABIB

### **Family Business Resilience in the Face of Risk**

Third generation family leader Rafiq Habib will outline how, in 1974, the family faced a huge challenge with the nationalization of their main banking business without any immediate compensation. Yet, after restarting and rebuilding, the new group now employs over 14,000 people worldwide in businesses ranging from automobiles to supermarkets, including a major international bank.

### **What Could the Family Have Done?**

Forum participants will work in table-sized groups to consider what the family could have done during the crisis; how did it develop the resilience needed? Next, you will learn how the family rebuilt, reinforcing values and implementing a vision, family governance, a family constitution and succession to the 4th and 5th generations. Peter Leach will bring together common themes from the discussions and draw broader lessons.

## **EVENING PROGRAMME**

Participants are invited to cocktails followed by dinner at the Royal Aeronautical Club

Today's sessions answer your toughest questions on letting go, succession and corporate social responsibility. You will also hear about creating family cohesion and next generation empowerment, learning from each other's experience and from a family case.

**THURSDAY,  
11 MAY, 2017**

## WHY ME? WHO, ME?

### Difficult Choices for Owners and Successors

**Prof. Denise Kenyon-Rouvinez** (Switzerland)

The Wild Group Professor of Family Business, Family Office, Governance, IMD Business School  
Director, IMD Global Family Business Center



Prof. Kenyon-Rouvinez has worked extensively with very large family firms around the world, including in her role directing IMD's educational programmes for family firms. She is author and co-author of a number of family business books and illustrated cartoon works. Denise will facilitate the discussions on the second day of the Forum, draw conclusions from other speakers' experiences and contribute her own presentations, particularly on the themes of letting go and next generation challenges.

## OPENING FAMILY BUSINESS DIALOGUE

### The Challenges of Leadership, Letting Go and Succession Planning

**Mr. Alan G. Hassenfeld** (United States)

Chairman of the Executive Committee, Hasbro, Inc.

Hasbro was started in 1923 by three newly-arrived Polish immigrants, Henry, Hillel and Herman Hassenfeld. Originally named Hassenfeld Brothers, it began manufacturing pencil boxes and school supplies. Under the second generation, the company introduced toys and today, Hasbro is a worldwide market leader with sales of well over \$4 billion.



ORIGINAL 1956  
PLAY-DOH®

Alan Hassenfeld will engage Forum participants in a "fireside chat", drawing upon their experiences and his own, which have included taking over the CEO role in tragic family circumstances and, in 2003, handing over to the first non-family CEO. He will also discuss philanthropy and how he has used his positions at Hasbro to promote change, such as for the rights of manufacturing workers in Asia.

## NEXT GENERATION CHALLENGES

### Finding Your Own Purpose

**Ms. Bruna Lambais** (Brazil)

Board Member, Manserv

Bruna Lambais had seen her parents grow their maintenance and services business into a family company employing over 22,000 people. She had worked in the firm as a management trainee and undertaken external experience, including creating her own business. Her question was whether to join the family firm and in what role?

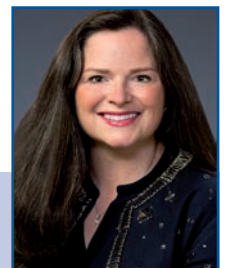


Bruna will explain how she found her purpose in the company, which was to ensure that corporate social responsibility became central to its culture. In a recent example, the company has partnered with an association providing professional training for disabled people. Each person who graduates successfully is offered a job on one of the company's sites.

## LIVE CASE IN TABLE-SIZED GROUPS – THE MANNIX FAMILY, CANADA

### Creating Family Cohesion – How Can Your Generation Contribute?

Margaret-Jean Mannix, a fourth generation (G4) family member and Chairman of the Family Office, will explore next generation development, particularly self-empowerment. Founded in 1898, the family's group of companies had become a major player in heavy construction, coal, oil and gas extraction. However, in 1997, the decision was made to monetize many of these assets.



MARGARET-JEAN  
MANNIX

### What Should G3 and G4 Have Done?

Participants will work in table-sized groups to consider the dilemma that G4 family members faced, just as the eldest were joining the business. What should they have done, with G3's help and on their own?

Margaret-Jean will outline how G4 (then children and young adults) worked out ground rules and a common vision.

Moving to recent times, Forum participants will consider what else G4 members could be doing to take on responsibility and collaborate together. In discussion with Denise Kenyon-Rouvinez, participants will hear about their many initiatives, including a 4½-month G4 learning trip to China.

## EVENING PROGRAMME

Participants are invited to cocktails followed by dinner

THURSDAY, 11 MAY – SECOND DAY



The Family Business Forum is sponsored by (in alphabetical order):



## Grow your business *and* strengthen your family relationships Learn from successful business families and leading experts



It is my great pleasure to invite you to our 17th Annual Family Business Forum in London. The Forum is a friendly and safe environment, exclusively for families that own large family firms and family offices from around the world.

### Unique Live Family Case Discussions

What makes the Forum unique is its emphasis on live case discussions. Each afternoon is devoted to working in table-sized groups to discuss genuine situations, in-depth, to learn from other families from every continent and from two world-class facilitators.

### Memorable Dinners on Wednesday and Thursday Evenings

The social dimension to the Forum is important too; there will be plenty of time, during breaks, luncheons and two dinners to renew contacts and build new friendships.

### New - Complimentary Momentum Club Membership

We are delighted to remind you of a recent benefit. Your Forum fee now includes complimentary Business Momentum Club membership for one year. Membership enables you to call for assistance at any time. Specific benefits include peer-to-peer mastermind calls, internship exchanges and one-on-one advice to learn from other families.

I look forward to welcoming you and your family to the Forum.

**Ian Partridge** Founder and Chairman, Loedstar S.A.

## FRIDAY, 12 MAY – MORNING: PEER-TO-PEER ADVICE AND DISCUSSION



**Facilitator: Mr. Peter Leach** (United Kingdom)

Adjunct Professor in Family Business, Imperial College London

Author "Family Enterprises, The Essentials"; Partner, Deloitte Global Leader – Family Enterprise Consulting, Deloitte LLP

The final morning is devoted exclusively to a peer-to-peer advice and discussion. In feedback each year, this workshop is rated as the most valuable part of the Forum.

Workshop facilitator Peter Leach is a leading advisor, teacher and writer, helping family owners around the world. His work includes creating governance structures, facilitating next generation participation and drafting family constitutions.

It is the opportunity for participants to seek advice on whatever questions are on their minds by drawing on the experience of the other families and practical advice from the facilitator.

Participants will work in table-sized groups to explore their own challenges or opportunities. Peter will answer outstanding questions so that participants return home with clear next steps.

*The workshop lasts all morning, ending with a Farewell Luncheon for all participants.*

## WHY YOU SHOULD JOIN THE FORUM AT THE DORCHESTER



MEMORABLE  
DINNERS

"All of us, having run family businesses, think our problems are unique, yet when we meet together through Loedstar we find that our issues are much more in common and by dialoguing problems become opportunities."

*Mr. Alan Hassenfeld, Chairman of Executive Committee, Hasbro, Inc., United States*

"In this rather unique setting, participants, including myself and other members of my family who have attended, feel relaxed when sharing their own experiences, whether positive or negative."

*Mr. Abdullah Adib AlZamil, Family Member, Zamil Group, Saudi Arabia*

"One of the greatest benefits of the seminars is to be able to exchange ideas and experiences with people from all over the world who are in a similar situation."

*Ms. Anneli Delmas, Marketing Director, Laurin Maritime, Sweden*



THE  
DORCHESTER

*Hold your place now on +41 22 548 3450 or [info@loedstar.com](mailto:info@loedstar.com)*

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# IMMEDIATE RESERVATION

## Family Business Forum, May 10–12, 2017

To reserve your place right away, please call us on +41 22 548 3450, or preferably  
Scan and E.mail this form to [info@loedstar.com](mailto:info@loedstar.com)

PLEASE COMPLETE *ONE FORM FOR EACH PERSON*. SIMPLY PHOTOCOPY THE FORM IF YOU NEED MORE COPIES

☐ I would like to reserve a place at the Family Business Forum, May 10–12, 2017

(please tick one box on each line)

- Wednesday, May 10 ☐ Day Programme (*Family cases and group discussions*)  
Dinner for all participants ☐ I will ☐ I will not be able to join
- Thursday, May 11 ☐ Day Programme (*Family cases and group discussions*)  
Dinner for all participants ☐ I will ☐ I will not be able to join
- Friday, May 12 ☐ Peer-to-Peer Discussion and Next Generation Workshop (*Interactive session*)

### Fee before reductions including complimentary Momentum Club membership

- ☐ I would like to attend the Forum **including one year's membership of the exclusive Business Momentum Club, beginning immediately**. Please send full details of all the benefits including peer-to-peer mastermind calls and the opportunity to learn from other families' experiences in one-on-one advice exchanges.
- ☐ If places are still available, I wish to reserve at the "Late Reservation Fee" by reserving and making payment on or after *April 1, 2017*. I agree to pay the full fee of 4,600 Francs (3 days) or 3,900 Francs (2 days) *less* any family/group reductions
- ☐ I wish to take advantage of the "Early Bird Fee" by making payment by *March 31, 2017*.  
The "Early Bird Fee" is 4,400 Francs (3 days) or 3,750 Francs (2 days) *less* any family/group reductions
- ☐ I wish to take advantage of the **"Super Early Fee" by making payment by February 15, 2017**.  
The "Super Early Fee" is 4,200 Francs (3 days) or 3,550 Francs (2 days) *less* any family/group reductions

### Fee Reductions for Families or Groups

There will be \_\_\_\_\_ (*write number of people*) attending in my family or group.

We understand that each person's fee will be reduced by \_\_\_\_\_ % (*write percentage from table below*)

Number of people in family or group attending Forum:	1	2	3-4	5+
Fee will be reduced for <i>each person</i> by:	0%	10%	15%	20%

### Payment

I have arranged the payment of \_\_\_\_\_ Swiss Francs (*please insert amount*) to be settled by:

- ☐ Bank transfer (*preferred method*): Please make the transfer to: Credit Suisse, CH-1211 Geneva 70  
Name: Loedstar S.A. Account No.: 331720-11-1 Swift: CRESCHZZ12B IBAN: CH03 0483 5033 1720 1100 1  
Please include the words *Family Business Forum* and *your name* in the transmission details
- ☐ Credit Card: ☐ American Express (*preferred card*) ☐ Visa ☐ Mastercard  
Card Number: \_\_\_\_\_ Expiry date: \_\_\_\_ / \_\_\_\_  
Card Holder's Name: (*as shown on the card*) \_\_\_\_\_

### Hotel Room Reservation (*please tick box*)

- ☐ Please confirm the best price available and hold the following room at The Dorchester for the dates indicated below:  
Arrival date: \_\_\_\_ / \_\_\_\_ / 2017 Departure date: \_\_\_\_ / \_\_\_\_ / 2017 (*please insert dates*)  
☐ Superior Double Room: *single* or *double* occupancy ☐ Deluxe Double Room: *single* or *double* occupancy
- ☐ I do *not* need a room reservation and will make my own accommodation arrangements

### Contact Details

Family name \_\_\_\_\_ First name \_\_\_\_\_ ☐ Mr. ☐ Mrs. ☐ Ms. ☐ Other \_\_\_\_\_  
Company (*if applicable*) \_\_\_\_\_ Job title (*if applicable*) \_\_\_\_\_  
Building/Street \_\_\_\_\_ District \_\_\_\_\_  
City \_\_\_\_\_ Country \_\_\_\_\_  
Nationality \_\_\_\_\_ Any dietary preferences (*e.g. vegetarian*) \_\_\_\_\_  
Mobile or Daytime telephone \_\_\_\_\_  
E.mail \_\_\_\_\_

I am joining the Forum because of my family's business. I am *not* an advisor and will *not* be promoting products or services.

**I agree to the conditions outlined above and overleaf. Please reserve a place for me immediately.**

Signature \_\_\_\_\_  
Name \_\_\_\_\_ Date \_\_\_\_\_

### Forum Overview and Venue

The Family Business Forum is a unique opportunity for you to meet, learn from and exchange ideas with families that own leading family businesses and family offices from every continent in the world.

In 2017, the Family Business Forum will take place in the magnificent ballroom at The Dorchester hotel, situated in the heart of the West End of London and overlooking the vast expanses of Hyde Park. Built in 1931 as the perfect grand hotel, The Dorchester provides unsurpassed levels of comfort, embodying the highest of traditional values.

Forum participants are guaranteed the lowest promotional room rates available at The Dorchester at the time of booking (*please see over*).

### Attendance

The Forum is designed **exclusively** for family members involved with family-controlled businesses or family offices. Attendance is limited to ensure that the Forum is genuinely a meeting for families.

### What is Included in the Family Business Forum?

The Forum includes presentations, workshops and case studies from outstanding speakers, generally members of business-owning families or leading family business experts. The programme lasts for two-and-a-half days, ending after lunch, and includes two dinners.

### Complimentary Momentum Club Membership

As soon as you reserve for the Forum, your fee now *includes* complimentary Business Momentum Club membership for one year. Membership benefits include peer-to-peer mastermind calls, internship exchanges and one-on-one advice exchanges to learn from other families.

### Arrival and Departure

The Forum begins at 9:00 a.m. on Wednesday, May 10 and concludes at 2:30 p.m. on Friday, May 12, 2017.

### Programme and Dinners

On the morning of the first day (*Wednesday*), family speakers will illustrate key challenges, and the whole afternoon will be spent on a genuine family business case, with participants working together in small groups.

The second day (*Thursday*) will include plenary sessions, family business cases and working with other participants in table-sized groups.

The final day (*Friday*) is an interactive workshop session including peer-to-peer and next generation discussions with other business-owning families.

On both Wednesday and Thursday evenings, participants and their partners are invited to dinners at venues around London.

### Confidentiality

You can expect the highest degree of confidentiality from us. The contact details of our clients and prospective clients are not communicated without their prior approval.

### Fee for Forum and Momentum Club

The fee is for all two-and-a-half days of Forum meetings including lunches, refreshments and two dinners (on Wednesday and Thursday).

In addition, the Forum fee *includes* **complimentary Business Momentum Club membership** for one year.

The fee does **not** cover flights, transfers, medical insurance, personal expenses or your hotel bill.

### Fee Reduction for Booking and Paying Early

The fee is in Swiss Francs. If you book and pay early there is a reduced fee of:

4,200 Francs for making fee payment by February 15, 2017. ("Super Early Fee");

4,400 Francs for fee payment by March 31, 2017 ("Early Bird Fee");

The late fee is 4,600 Francs for payment on or after April 1, 2017. ("Late Reservation Fee").

### Fee Reductions for Two Days Attendance

Most participants attend on the three days. However, if you can only attend two days the fee reduces to 3,550 Francs for fee payment by February 15, 2017 and 3,750 Francs for payment by March 31, 2017. The two-day fee increases to 3,900 Francs for payment on or after April 1, 2017.

### Family and Group Fee Reductions

Often, families decide to have several family members join the Forum at the same time, in a shared learning experience.

If you join us as part of a group, either with friends or other family members, we are delighted to reduce the fee for every member of the family or group.

The table shows how the fee reduces for every member of your party or family group, depending on how many attend:

Number of people in your group attending the Forum:	1	2	3-4	5+
Fee will be reduced for each person by:	0%	10%	15%	20%

### Cancellation Policy

If you need to cancel, you may either arrange for someone else to take your place or you may join our next Forum, or any equivalent seminar, free of charge.

However, if you prefer a refund, there will be a cancellation charge based on the number of days before the programme:

Over 60 days:	0%
59-45 days:	30%
Under 45 days:	100%

Should we have to cancel the Forum for any reason, including events beyond our control, you will receive a 100% refund of any fees already paid by you.

(See overleaf for Reservation Form)