

FAMILY BUSINESS FORUM MIDDLE EAST & ASIA

*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 and sessions in order of appearance:

- Mr. Abdallah Obeikan, Obeikan Investment Group (Saudi Arabia)
- Mr. Nabeel Kanoo, YBA Kanoo Group of Companies (Bahrain)
- Mr. Christopher Oughtred, William Jackson Food Group (United Kingdom)
- The Bin Mahfouz Family, SEDCO Holding (Saudi Arabia)
- Mr. Conor Roche, NTR plc and Doyle Hotel Group (Ireland)
- Mr. Yasser Al Kadi, Kadi Group Holding (Saudi Arabia)
- Family Communication Case and Role-Plays (Saudi Arabia)
- Peer-to-Peer Advice and Discussion

Forum Chairman and Facilitator:

- Mr. Peter Leach, Imperial College London
- Author of "Family Enterprises, The Essentials" (United Kingdom)

*The Four Seasons Hotel, Riyadh
Tuesday–Thursday, 28–30 November, 2017*

TUESDAY
28 NOVEMBER, 2017

The Family Business Forum is designed exclusively for family members with major family firms or family offices. During two-and-a-half days, you will hear from and learn with many different family firms, discussing real-life cases 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. Each day, Peter will facilitate discussions, draw conclusions and contribute his own presentations. His opening session will introduce a number of key family business concepts that will be addressed in more detail by the family speakers during the course of the Forum.

DEFINING THE FAMILY’S ROLE



Setting Clear Guidelines

Mr. Abdallah Obeikan (Saudi Arabia)

Group CEO, Obeikan Investment Group (OIG)

Since it was founded by Abdallah Obeikan’s father and brother, the Group has grown to become a leader in paper, plastics, liquid packaging and education.

Drawing on his experience as Family CEO today, Abdallah will focus on the need to carefully define the roles of family members inside or outside the business. He will bring the perspective, relatively unusual for the region, of family involvement in management having been deliberately limited. He will particularly consider how 50+ third generation family members outside the business can be prepared for future ownership and governance responsibilities.

A FAMILY IN BUSINESS FOR OVER 120 YEARS



A Work in Progress

Mr. Nabeel Khaled Kanoo (Bahrain)

Chairman, Kanoo Family Council and Board Member, YBA Kanoo, Bahrain Board

Yusuf Bin Ahmed Kanoo Group of Companies

Kanoo is one of the largest independent, family-owned multinationals in the Middle East with an extensive portfolio of businesses and strategic partnerships. Its divisions include shipping, logistics, travel, industrial and energy, capital investments and real estate.

Kanoo’s family-led approach to business includes a tradition of providing benefits for all family members. Nabeel will suggest that the company’s success is also based on a willingness to change, where doing nothing is not an option. He will outline how the family has managed different challenges, such as by professionalizing the business early, by bringing non-family executives into key positions and constantly seeking to improve family governance.

LIVE CASE IN TABLE-SIZED GROUPS – WILLIAM JACKSON, UNITED KINGDOM



CHRISTOPHER
OUGHTRED

A Step-by-Step Process to Develop Family Governance

Christopher is a 5th Generation (G5) member of the Oughtred family, which owns the William Jackson Food Group, founded by his great-great-grandfather in 1851 in East Yorkshire. In this live case, you will learn how a family created and implemented its family governance. Specifically, you will hear how the Oughtred family constitution, created by G4/G5 in the early 1990’s, has been tested by real-life events and has since been updated with G6’s involvement.

Key Questions and Decisions: What Would You Have Done?

During the afternoon, Forum participants will work in table-sized groups to discuss some of the challenges and decisions that the Oughtred family faced during their process. What would you have done in their place? Next, you will hear what actually happened from Christopher, drawing from his first-hand experience as a former Chairman. Finally, Peter Leach will identify common themes from the discussions and suggest broader lessons.

EVENING PROGRAMME

Participants are invited to an open air dinner at the poolside restaurant “The Grill” hosted by Riyadh Bank

TUESDAY, 28 NOVEMBER – FIRST DAY

Today's sessions will answer your toughest questions on family governance, overcoming disunity and encouraging entrepreneurship. You will learn how to improve family communication from role-plays and from each other's experience.

**WEDNESDAY,
29 NOVEMBER, 2017**

FAMILY AND BUSINESS GOVERNANCE IN A LARGE FAMILY*

Learning from One Family's Governance Journey

The Bin Mahfouz Family (Saudi Arabia)

Third Generation Family Members, SEDCO Holding

The late Sheikh Salem Bin Mahfouz rose from a modest background to found NCB, Saudi Arabia's first bank, in 1953 and SEDCO in 1976. SEDCO has since grown from a small trading business into one of Saudi Arabia's largest wealth management organizations.

Two third-generation Bin Mahfouz family leaders will discuss the challenge of maintaining cohesion in a fast-growing family. In 1990, the family took its first steps towards creating an innovative and comprehensive family governance system. Today, with well over 200 family members, it includes a family constitution, family assembly, family council, annual event and a fund to encourage new enterprises.

** The above is a provisional synopsis which needs to be finalized with the family speakers*

OVERCOMING A LEGACY OF DISUNITY

Implementing an Early Inter-Generational Transition

Mr. Conor Roche (Ireland)

Executive Director, NTR plc and Director, Doyle Hotel Group

Conor Roche and his third generation (G3) siblings are in the unusual situation that both parents come from separate family business backgrounds: NTR, a world-class renewable energy provider and The Doyle Collection, a group of luxury boutique hotels.

Conor will explain how a legacy of disunity during G2 in both his parents' families had made them determined to adopt a different approach with their own children. He will outline how his family developed its own collective vision based on "family partnership". This included creating a constitution, communication training, early transition of ownership to G3 and appointing non-family heads for the businesses and family office.



FAMILY AND BUSINESS GROWTH

Maintaining the Entrepreneurial Spirit

Mr. Yasser Al Kadi (Saudi Arabia)

Vice President, Kadi Group Holding
Managing Director, Zajil Express Trading Company

The Al Kadi family business story began in 1938, in Jubail, when they started importing food commodities.

They moved to Dammam and by the 1970s had established new companies in many business sectors. However, as the family grew, there were signs of diverging business interests. The family decided to separate the businesses by branch, yet maintain their very strong ties at a unified family level.

Yasser will explain how the family's approach has developed the younger generation's entrepreneurial spirit and individual credibility. He has been closely involved in his family branch's logistics and shipping businesses, including the growth of Zajil Express services.



FAMILY COMMUNICATION – ROLE-PLAYS AND GROUP DISCUSSIONS

How Do You Communicate Difficult Issues Effectively?

All family business systems have in-built tensions. For example, salaried family executives have different interests from dividend-receiving shareholders. If such tensions are not properly addressed and managed, they can lead to worsening disagreements. How do you discuss and resolve tough problems together, particularly in a hierarchical setting?

What Can You Do? Principles and Practice

Peter Leach will set up and comment on role-plays, carried out with colleagues, centred around a realistic family case. They will incorporate common sources of friction and communication challenges. Participants will work in table-sized groups to discuss the role-plays and potential ways of handling them better. At the end, Peter will draw conclusions, explain key principles and suggest practical ways of improving family communication.



IMPROVING FAMILY COMMUNICATION

EVENING PROGRAMME

Participants are invited to a Farewell Reception in the Kingdom Ballroom Foyer

WEDNESDAY, 29 NOVEMBER – SECOND DAY

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

BLACKROCK®



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Private Banking

[SCHILLINGS]

Grow your business and strengthen your family relationships

THURSDAY, 30 NOVEMBER – THIRD DAY MORNING ONLY
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.

INVITATION: WHY YOU AND YOUR FAMILY SHOULD JOIN US



It is my great pleasure to invite you to our Family Business Forum in Riyadh. Now in its 17th year, the Forum provides a friendly and safe environment, exclusively for families that own large family firms and family offices. What makes the Forum unique is its emphasis on live case discussions where you work in table-sized groups to discuss genuine situations.

Your Forum fee includes a complimentary Business Momentum Club membership; you can call on us, year-round, to connect you with other families for advice. Furthermore, if your family group is three or more people, please ask about becoming a Family Business partner so that family places, branding and business support are all included in one package.



About the Day and Evening Venues at the Four Seasons

The Forum will be held at the luxurious Four Seasons Hotel in Riyadh's most iconic landmark, the Kingdom Tower. Hotel rooms between the 30th to 50th floors all have superb views and there is direct lobby access to the Kingdom Centre mall. Leisure facilities include an outdoor pool, health club and ladies-only exclusive lounge and gym. Forum activities by day will be held in the Kingdom Ballroom and meeting rooms. There will be two evening events; a poolside dinner at The Grill restaurant and a Farewell Reception in the Ballroom Foyer.



FORUM HELD
IN THE
BALLROOM

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

Ian Partridge Founder and Chairman, Loedstar S.A.

HOTEL ROOMS
IN KINGDOM
TOWER

TESTIMONIALS: WHAT PREVIOUS PARTICIPANTS HAVE SAID

"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 the 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

Reserve your place now on +41 22 548 3450 or info@loedstar.com

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The Family Business Forum is held in co-operation with:



RESERVATION FORM

Family Business Forum, Riyadh, November 28-30, 2017

To reserve your place right away, register on www.loedstar.com or call us on +41 22 548 3450 or Email a scan of this form to info@loedstar.com

I would like to reserve a place or family places at the Family Business Forum, Riyadh, November 28-30, 2017

(please tick one box on each line)

- Tuesday, November 28 Day Programme (Family cases and group discussions)
Dinner for all participants I will I will not be able to join
- Wednesday, November 29 Day Programme (Family cases and group discussions)
Evening Reception for all participants I will I will not be able to join
- Thursday, November 30 Peer-to-Peer Discussion Workshop (Interactive discussions)

Fee (in US Dollars) with reductions for reserving and paying early

- I would like to attend the Forum **including membership of the Business Momentum Club for one year, beginning immediately.** Please send full details of all the benefits including family-to-family connections, peer-to-peer mastermind calls and the opportunity to learn from other families' experiences in one-on-one advice exchanges. The fee level is:
- "First Forty Super Early Fee" (20% reduction)** for the first 40 places reserved and settled by credit card or bank transfer.
The "First Forty Super Early Fee" is \$2,960 (3 days) or \$2,520 (2 days) less any family/group reductions below
- "Early Bird Fee" (10% reduction)** by making payment by October 15, 2017.
The "Early Bird Fee" is \$3,330 (3 days) or \$2,835 (2 days) less any family/group reductions below
- "Full Fee" (0% reduction)** by making payment on or after October 16, 2017.
The "Full Fee" is \$3,700 (3 days) or \$3,150 (2 days) less any family/group reductions below

Additional Fee Reductions for Family Groups

In addition to the fee reductions for booking early, there are further reductions for family groups.

There will be _____ (write number of people) attending in my family group.

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

Number of people in family or group:	1	2	3	4+
Fee will be reduced for each person by:	0%	10%	15%*	See below*

* If your family or group is 3 or larger, or if you are interested in enhanced visibility and business connections for your company, please ask about how to apply to become a Family Business Partner so that family places, branding and business support are all included in one competitive package.

Payment

I have arranged the payment of _____ US Dollars (please insert amount) to be settled by:

- Credit Card (please tick which one): American Express Mastercard Visa

Loedstar will contact you to obtain card details.

- Bank transfer: Please make the transfer to: Credit Suisse, CH-1211 Geneva 70, Switzerland
Name: Loedstar S.A. Account No.: 331720-12 Swift: CRESCHZZ80A IBAN: CH93 0483 5033 1720 1200 0
Please include your name and invoice number in the transmission details

Hotel Room Reservation (please tick box)

- Please send details of the special Forum rates for rooms at the Four Seasons Riyadh Hotel in the Kingdom Tower:
Arrival date: / / 2017 Departure date: / / 2017 (please insert dates)
- 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) _____
City _____ Country _____
Nationality _____ Any dietary preferences (e.g. vegetarian) _____
Mobile Phone _____ Daytime Phone _____
Email _____ Office Contact Name _____

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.

The Forum will be held at the luxurious Four Seasons Hotel in Riyadh's most iconic landmark, the Kingdom Tower. Forum activities by day will be held in the Kingdom Ballroom and Milan Meeting Room (final morning) on the ground floor.

Hotel guest rooms between the 30th to 50th floors all have superb views and there is direct access from the lobby to the Kingdom Centre mall. Leisure facilities include an outdoor pool, health club and ladies-only exclusive lounge and gym.

Forum participants benefit from special rates at the Four Seasons, subject to availability. Please reserve as early as possible as the hotel is likely to be full on the Forum dates.

Who Should Join?

The Forum is for men and women (mixed event) from families that own family firms or family offices, whether or not they actually work in the business day-to-day or pursue careers outside of it.

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 evening events.

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 9.30 a.m. on Tuesday, November 28 and concludes at 2:00 p.m. on Thursday, November 30, 2017.

Programme and Dinners

On the morning of the first day (*Tuesday*), 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 (*Wednesday*) will include plenary sessions, family business cases and working with other participants in table-sized groups.

The final day (*Thursday*) is an interactive workshop session including peer-to-peer discussions and advice-sharing with other business-owning families.

On the Tuesday evening, there is an open air dinner at the poolside restaurant "The Grill" and on Wednesday evening a Farewell Reception in the Kingdom Ballroom Foyer.

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 the Forum meetings over three days including lunches, refreshments and two dinners (on Tuesday and Wednesday). In addition, it includes complimentary Business Momentum Club membership for one year.

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

Language

Because of the international speakers and audience, all the presentations will be in English. During the table-sized discussions, participants are free to speak the most convenient common language, which will often be Arabic.

Fee Reduction for Booking and Paying Early

The fee is in US Dollars and you will receive an invoice as soon as you reserve. There are reductions if you settle the fee early, either by credit card or bank transfer:

The lowest fee (*20% reduction*) is the "First Forty Super Early Fee" which is for the first 40 places to be reserved and paid;

The next fee level (*10% reduction*) is the "Early Bird Fee" for making payment by October 15, 2017;

The final fee level (*0% reduction*) is the "Full Fee" which is for payments on or after October 16, 2017.

Additional Fee Reductions for Two Days Attendance

Most participants attend for the full two-and-a-half days. However, if you can only attend two days then the two-day rate applies. If you can only attend one day, the one-day fee is half of the two-day fee.

Additional Fee Reduction for Family Groups

If you join us as part of a family group, we are delighted to further reduce the fee for each group member as follows:

Number of people in your group:	1	2	3	4+
Fee will be reduced for each person by:	0%	10%	15%*	See Below*

* If your family or group is 3 or larger, or if you are interested in enhanced visibility and business connections for your company, please ask about how to apply to become a Family Business Partner so that family places, branding and business support are all included in one competitive package.

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 and fee details)