

# 20<sup>TH</sup> ANNIVERSARY FAMILY BUSINESS FORUM

*Now in its 20th year, the Forum is a friendly environment in which to connect with other families and work together on real-life cases*



*Experience it on a sophisticated virtual conference platform  
Learn from successful business families and leading experts*

*Family business speakers shown in order of appearance:*

Mr. Frédéric Banzet, Peugeot Family, Peugeot Invest (France)  
Mr. Sammy Lee and Ms. Andrea Lee  
Lee Kum Kee Co. Ltd (Hong Kong SAR, China)  
Mr. Andy Rubin, Pentland Group Ltd (United Kingdom)  
Dr. Basma Sulaiman Al Zamil, Zamil Group (Saudi Arabia)

*Forum Facilitators and Family Business Experts:*

Mr. Peter Leach, Adjunct Professor in Family Business - Imperial College London  
Founder and Chairman, Peter Leach Associates Ltd.  
Author of “Family Enterprises, The Essentials” (United Kingdom)  
Prof. Denise Kenyon-Rouvinez, Formerly Wild Group Professor of Family Business,  
Family Office, Governance - IMD Business School  
Author of “Governance in Family Enterprises” (Switzerland)

*Inspirational speakers, group discussions, enjoyable on-line networking  
Tuesday-Thursday, 8-10 June 2021*

**TUESDAY**  
**8 JUNE, 2021**

The Family Business Forum is designed exclusively for family members with family firms or family offices. Each day, you will hear from and work with families from every continent, discussing real-life family cases in small groups.

## FAMILY BUSINESS DYNAMICS



### An Introduction

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

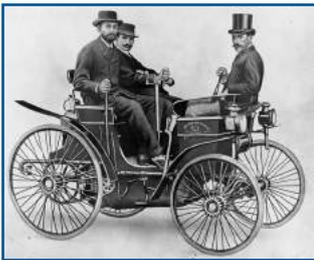
Adjunct Professor in Family Business, Imperial College London

Founder and Chairman, Peter Leach Associates Ltd.

Author "Family Enterprises, The Essentials"

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. 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.

## PEUGEOT – AN INDUSTRIAL FAMILY'S STORY



EARLY DAYS: 1890 PEUGEOT



FRÉDÉRIC BANZET

### The Changing Relationship Between a Family and its Businesses

**Mr. Frédéric Banzet** (France)

Eighth Generation Peugeot Family Member; Senior Partner, Peugeot Invest and Chairman and CEO of Peugeot Invest UK Limited, Former CEO of the Citroën brand

Beginning in 1810, the Peugeot family's industrial heritage started with coffee grinders, followed by bicycles and today PSA Group is Europe's second-biggest car manufacturer with brands including Peugeot, Citroën, DS, Opel and Vauxhall.

Frédéric Banzet will discuss how the family's business focus has evolved through its holding in FFP, a long-term investment company, majority-owned by Etablissements Peugeot Frères. In 2014, the family gave up somewhat partial control of its car business, through an imposed restructuring of the capital.

### Typical Group Discussion Topic – How Has Your Own Family Handled Difficult Decisions?

Participants will work in virtual groups to share experiences of difficult decisions that their own families have faced.

What went well and what could have been handled better (with the process and outcome)?

Over the last 20 years, the Peugeot family has drawn from its industrial experience to develop diversified assets. This move also helped support a successful turnaround. Frédéric will explain how their family governance has allowed different family points of view to coalesce into a common approach leading towards strategic renewal.

## LIVE FAMILY CASE – LEE KUM KEE, HONG KONG



SAMMY LEE (G4)



ANDREA LEE (G5)

### Family Governance, Succession and Invisible Leadership

**Mr. Sammy Lee**, Chairman, Chief Invisible Officer &

Chief Happiness Officer, LKK Health Products Group Limited

**Ms. Andrea Lee**, Head of Family Office, Lee Kum Kee Family

The Lee Kum Kee story began in 1888, when founder Lee Kum Sheung accidentally created oyster sauce when making soup. Today, Lee Kum Kee is a global brand leader in Asian sauces and health-care products.

By 2005, at the start of this case, Sammy Lee and three of his fourth-generation (G4) siblings were running substantial businesses under their father's chairmanship. They realized they needed to spend more time on strategic issues including succession planning.

We will hear from Sammy about the comprehensive systems that the family actually implemented under G4 leadership. These included creating a family council, family office and family training centre. There were many innovations such as a rotating "casting vote" in the event of a tie and that, once used, had to be passed on to another family leader.

### Typical Group Discussion Topic – The Succession Challenge

At the start of the case, G5 family members were teenagers and young adults with their own aspirations and views.

What next steps in the Lee family G4 to G5 succession would you have recommended?

Bringing the case up to the present day, the final session will review what actually happened during the G4 to G5 succession process. Andrea Lee (G5), who has recently taken over the role of Head of Family Office, will join her uncle Sammy Lee (G4) to discuss their gradual next-generation transition, its challenges and successes. They will also discuss some of Lee Kum Kee's powerful strategic business innovations such as the Auto-pilot Leadership Model to provide direction (but not direct command) and a Happiness Index to monitor success.

## FIRST END-OF-DAY VIRTUAL RECEPTION

After the day's closing session, participants are invited to join a virtual networking reception hosted by Edmond de Rothschild

TUESDAY, 8 JUNE – FIRST DAY

Today's sessions will answer your toughest questions on family business topics including: family leadership and influence on culture, family training, next generation development and responding to acute global challenges.

**WEDNESDAY,  
9 JUNE, 2021**

## BUSINESS VALUES AND CULTURE

### Family Influence and Leadership

**Mr. Andy Rubin** (United Kingdom)  
Deputy Chair, Pentland Group Ltd

Founded in 1932 as a shoe business in Liverpool, the family later bought then sold Reebok, using the proceeds to help create a "family of brands". Today, Pentland is a family-owned leader in sport and fashion with brands including Speedo, Ellesse, Canterbury, and a majority share in global retailer JD Sports.

Andy Rubin, member of the third generation and Deputy Chair of the Pentland Group, will outline the company's unique culture, recognised by awards including "Best Corporate Workplace in the UK" and the "2017 IMD/FBN Global Family Business Award".



ANDY RUBIN



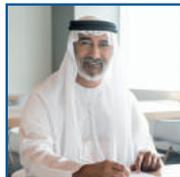
**Typical Group Discussion Topic – Family Influence and Leadership**  
*How do you use your family business ownership for competitive advantage?*

## NETWORKING AT THE FORUM COFFEE BAR

Networking with other families is the glue that holds the Forum together.

At breaks, you can meet one-on-one or "look" at different group conversations to decide which ones to join.

Or you can spend quiet time off-line, if you prefer.



**“Who shall I connect with today?”**

NETWORKING DURING EACH BREAK:  
GROUP OR ONE-ON-ONE CONVERSATIONS



## FAMILY TRAINING AND DEVELOPMENT

### Developing Responsible, Self-Empowered Individuals

**Dr. Basma Sulaiman Al Zamil** (Saudi Arabia)  
General Manager, Corporate Human Resources, Zamil Group

At Zamil, an international industrial and services group, the second generation had long-recognized the need to empower the third and fourth generations effectively.

**Typical Group Discussion Topic – Next Generation Preparation and Development**  
*How is your family preparing your next generation members for future roles (within or outside the business)?*

Third generation HR leader Dr. Basma Al Zamil will outline how world-class training for Zamil family executives has been expanded into a much broader mission: to help all fourth generation family members become responsible and self-empowered individuals. She will be joined by a fourth generation Zamil family member to explain their innovative Generation-to-Generation (G2G) programme (designed for age six to young adult).



## HIGH-ENERGY DISCUSSION GROUPS

### Responsible Ownership; The Global Challenge

**Prof. Denise Kenyon-Rouvinez** (Switzerland)  
Formerly Wild Group Professor of Family Business, Family Office, Governance, IMD Business School

Prof. Kenyon-Rouvinez has worked extensively with family firms around the world, including in her recent role at IMD. Author of many books, she is also a member of the World Economic Expert Network.

Denise will explain how family firms are best-positioned to respond to global challenges because families control their ownership, and hence, strategic business direction. Working in high-energy virtual groups, participants will discuss acute global challenges and how they might help address them.



## FINAL END-OF-DAY VIRTUAL RECEPTION

After the day's closing session, participants are invited to join a virtual networking reception

WEDNESDAY, 9 JUNE – SECOND DAY

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



EDMOND  
DE ROTHSCHILD



NORTHERN  
TRUST



SCHILLINGS



## THURSDAY, 10 JUNE – PEER-TO-PEER DISCUSSION – THIRD DAY



**Facilitator: Mr. Peter Leach** (United Kingdom)  
Adjunct Professor in Family Business, Imperial College London; Author “Family Enterprises, The Essentials”  
Founder and Chairman, Peter Leach Associates Ltd.

The final day is devoted exclusively to 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 hard-earned experience of the other families and feedback from the facilitator.

Participants will work in virtual discussion groups to explore their own challenges or opportunities. Peter will answer outstanding questions so that participants leave the Forum with clear next steps.

## INVITATION: WHY YOU AND YOUR FAMILY SHOULD JOIN US



It is my great pleasure to invite you to our 20th Anniversary Family Business Forum, taking place on a sophisticated virtual conference platform. The Forum is 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 small groups to discuss genuine situations with other families. The networking dimension is important too, with two end-of-day virtual receptions, as well as breaks in a virtual “coffee bar” to help build new friendships and connections.

You can choose between attending two days, three days or an annual membership that, in addition to the Forum, includes year-round support and other events such as a virtual Mini-Forum in November.

I look forward to welcoming you and your family to the Forum.  
**Ian Partridge** Founder and Chairman, Loedstar S.A.

## 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*

“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. This is of great value.”

*Ms. Anneli Laurin Delmas, Laurin Family*

“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*

“In **Loedstar’s** intense training,  
**the company seems to have found a global niche.**”

*The Wall Street Journal Europe*

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

**Loedstar S.A.** 36 avenue Cardinal-Mermillod • 1227 Carouge, Geneva • Switzerland  
Enquiries and Reservations: +41 22 548 3450 • E.mail: [info@loedstar.com](mailto:info@loedstar.com) • Internet: [www.loedstar.com](http://www.loedstar.com)

The Loedstar logo and wording are trademarks. No reproduction, copy or transmission of any part of this publication may be made without prior permission. Ref. FBF21.  
Please note that it may occasionally be necessary, for reasons beyond the control of Loedstar S.A., to alter the published programme, content and presenters.

## 20<sup>TH</sup> ANNIVERSARY FAMILY BUSINESS FORUM: REGISTRATION DETAILS

### Overview

The 20<sup>th</sup> Anniversary Family Business Forum will take place on a sophisticated virtual conference platform on Tuesday-Thursday, June 8-10, 2021. The Forum is **exclusively** for family members involved with family-controlled businesses and single family offices (family office heads may also join, if they are part of a family group).

### A choice of participation levels and fees

You can choose between *three* alternative participation levels:

#### Alternative 1:

#### **Loedstar *individual* annual membership (Fee 1,850 Swiss Francs)**

For you, as an individual, being part of an ongoing community from all over the world gives you year-round, unlimited access to members of other families for advice and access to hard-earned experience.

Annual membership includes full attendance at the Forum and two other major Loedstar events, along with a comprehensive list of ongoing benefits for you to choose from. You simply tell us which ones you want; we will then arrange them.

- **Family Business Forum (virtual)** any *one* Family Business Forum
- **Family Business Mini-Forum (virtual)** any *one* Mini-Forum
- **Peer-to-Peer Advice Workshop (virtual)** any *one* Peer-to-Peer workshop
- **Mastermind call groups** are uniquely effective, 75-minute calls to get and reciprocate confidential advice from other families. A group of five or six, each from different families, joins a video call
- **One-on-one video call(s)** with a key member(s) of another family to get advice or help on a specific issue
- **Private one-on-one consultation** with a family business expert
- **Year-Round advice, support and connections with other families** whenever you need them

#### Alternative 2:

#### **Forum attendance throughout *three days* (Fee 750 Swiss Francs)**

#### Alternative 3:

#### **Forum attendance throughout *two days* (Fee 600 Swiss Francs)**

Different family members can choose different alternatives for themselves.

### How to register and group reductions

You reserve all your family's Forum places using our easy-to-use registration link with secure payment. The following family group reductions calculate automatically:

<i>Number</i> registering together in group:	1	2	3	4	5	6+
<i>Fee reduction</i> for everyone in group:	0%	5%	10%	15%	20%	25%

The group reduction is based on how many register together and it applies to everyone in the group, so it makes sense that *your group number includes everyone* you expect to attend. *However, you can confirm actual family member names later.*

## FAMILY BUSINESS FORUM: REGISTRATION DETAILS – CONT.

### Cancellation Policy

If you need to cancel, even last minute, 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 start of the Forum:

<i>Over 45 days:</i>	<i>0%</i>
<i>44-30 days:</i>	<i>30%</i>
<i>Under 30 days:</i>	<i>100%</i>

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.

### Confidentiality

You can expect the highest degree of confidentiality from us. Your contact details will not be communicated to other participants without your prior approval.

### Forum dates and timing for your diary

- **Forum dates: Tuesday-Thursday, June 8-10, 2021**
- **Main sessions start (June 8, 9, 10):**  
9.00 am London \* 10.00 am Geneva \* 11.00 pm Riyadh  
12.00 pm Dubai \* 3.00 pm Jakarta \* 4.00 pm Hong Kong
- **Main sessions end - latest (June 8 & 9):**  
Six hours after the start, including breaks (*3.00 pm London*)
- **End-of-Day virtual receptions (June 8 & 9):**  
Begin when the main sessions end (*3.00 pm London – latest*)
- **Forum ends - latest (June 10):**  
Four hours after the start, including breaks (*1.00 pm London*)