

FAMILY BUSINESS FORUM WITH LIVE FAMILY CASES

*Addressing tomorrow's predictable family business problems, today
Learn from two real-life family cases and a leading expert:*



*Lessons on enhancing family resilience, culture and values
Family constitution co-creation and encouraging family engagement*

Family business speakers shown in order of appearance:

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

Mr. Paddy Walker, Chief Executive Officer
J Leon Group

Mr. Harry Walker, 5th Generation Family Member
J Leon Group

Chairman and Facilitator:

Mr. Peter Leach, Adjunct Professor in Family Business, Imperial College London
Founder and Chairman, Peter Leach Associates Ltd.
Author of "Family Enterprises, The Essentials"

*George V Hall, The Bloomsbury Hotel, London
Tuesday, 23 May, 2023*

MORNING SESSION

In the morning, working in groups on a live family case, you will learn about:

- ★ Family business **resilience** ★ **Values** ★ How **other families** do things
- ★ Family **guidelines** ★ **Culture** versus structure ★ Family business **longevity**

FAMILY AND BUSINESS SUCCESS



Addressing Tomorrow's Predictable Family Business Problems, Today

Mr. Peter Leach

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 lessons and share his own ideas. His end-of-morning session will expand upon how to improve family culture and will introduce key family business concepts that will be covered in more detail in the afternoon sessions.

LIVE CASE IN TABLE-SIZED GROUPS – C. HOARE & CO. PART I



FOUNDER:
SIR RICHARD HOARE ★

★ Reproduced with thanks to the National Trust



11TH GENERATION:
BELLA HOARE

Lessons Learned over Eleven Generations

Miss Bella Hoare

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 still 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 owner-director Bella Hoare will begin the case by speaking about this history. In particular, she'll mention significant early mistakes and the crucial decisions that enabled the company to recover from them.

GROUP DISCUSSIONS AND BROADER CONCLUSIONS



GROUP DISCUSSION

Overcoming Setbacks and Building Resilience

For many Forum participants, the most highly-valued aspect is the opportunity to work with and learn from other family businesses in small groups.

In this session, you will work with other participants in table-sized groups to discuss your own experiences of family and business setbacks; whether they were overcome and how they may have improved resilience. These group discussions will take advantage of the diversity of the family businesses present (including different business stages, industries and geographies).

Peter Leach will then bring the whole room together, hearing what the different tables came up with and drawing broader conclusions.

LEARNING FROM THE CASE – C. HOARE & CO. PART II

Implicit Rules and Necessary Compromises

Bella Hoare

Bella Hoare will build upon the group discussions to consider how lessons have been drawn from challenges faced by previous generations and adjusted to match more recent circumstances. One example is the creation of a strong business culture based on family values and implicit rules. Another is a willingness to accept certain compromises, such as readiness to limit the complexity of the business to reduce risk.

Delving into Family Culture and Resilience; Introducing Family Governance Concepts

After a question-and-answer discussion with Bella Hoare, Peter Leach will expand upon how to improve family business culture (including a culture of resilience). Finally, in advance of the afternoon case, he will introduce key concepts concerning the family business system, family governance and family constitutions.

NETWORKING LUNCHEON

There will be plenty of time, during breaks and luncheon, to meet with the other participants, renew contacts and build new friendships

TUESDAY, 23 MAY – MORNING

In the afternoon, during the live case and peer-to-peer workshop, you will learn about:

- * **Pre-empting problems** with policies
- * **Family constitution** co-creation
- * **Business succession**
- * Setting up a **family office**
- * **Family in-laws** and family executives
- * **Family engagement**

AFTERNOON AND EVENING

LIVE FAMILY CASE DISCUSSION – J LEON PART I Defining Family Guidelines During a Business Reorientation

Mr. Paddy Walker

Chief Executive Officer, J Leon Group

Over four generations, the Slowe family developed J Leon from a chain of tobacco outlets into a significant portfolio of high street property, then created a broadly-diversified family investment office incorporating hedge funds, private equity and long-only equity investments.

Bringing the perspective of a fourth generation “family in-law” and CEO, Paddy will discuss why, at the time of this reorientation, the family also decided to simplify its shareholder structure and create greater clarity in family policies.

Working in groups, participants will explore some of the most common, yet difficult areas of family policy, where each family has to decide its own “right” answer to controversial questions such as: when family members may work in the business; in-law policy; dividend policy and family retirement age.



PADDY WALKER

CO-CREATION OF A FAMILY CONSTITUTION – J LEON PART II

The Result of Each Family’s Unique Process, Culture and History

Mr. Paddy Walker

In the second part of the case, Peter Leach will ask each table to share its findings and will add his own comments. Next, Paddy will use the “co-creation” of the Slowe family’s constitution to illustrate how the end result is inevitably unique, reflecting an individual family’s own process, culture and history. He will explain some of the key policies that his family decided upon, the rationale behind them and how family engagement has increased since.

In the closing discussion with Peter Leach, Paddy will be joined by his son, Harry Walker, bringing the viewpoint of a fifth generation family member who does not work in the business.



EARLY DAYS AT J LEON

PEER-TO-PEER ADVICE WORKSHOP AND DISCUSSIONS

Exploring Your Own Challenges and Opportunities

Mr. Peter Leach

The final session is devoted exclusively to peer-to-peer advice and discussion. In feedback, year-after-year, this workshop is rated by participants as the most valuable part of the Forum.

In advance of the event, you will be asked to suggest or select topics that are on your mind. At the workshop, you will be allocated to a table-sized discussion group, along with others who are interested in the *same* topic (members of the same family will be on different tables).

The workshop is the opportunity for you to seek advice by drawing on the hard-earned experience of the other families as well as that of the facilitator, Peter Leach. He will answer outstanding questions and draw broader conclusions, so that you return home with clear next steps for whatever challenges you may face.



PEER-TO-PEER ADVICE:
DRAWING CONCLUSIONS

END-OF-FORUM FAREWELL RECEPTION

Participants are invited to an End-of-Forum Farewell Reception in the Coral Room. It will include refreshments, drinks and canapés served standing so that participants can circulate freely.

The Reception is the opportunity to relax at the end of a fairly intensive day. It’s also the chance to share what you have learned, exchange business cards and plan to stay in contact.



THE CORAL ROOM

AFTER THE FORUM

Participants are encouraged to stay in touch to continue to share challenges and learn from each other. If you wish, after the Forum, we can help you continue with peer-to-peer connections and discussion groups

TUESDAY, 23 MAY – AFTERNOON AND EVENING



FAMILY BUSINESS FORUM

The Bloomsbury Hotel, Tuesday, 23 May, 2023

INVITATION: WHY YOU AND YOUR FAMILY SHOULD JOIN US



IAN PARTRIDGE

It is my great pleasure to invite you to our Family Business Forum in London. We have been holding these unique, focused learning experiences around the world for 23 years and, in that time, hundreds of families have joined us. The Forum is a friendly and safe environment, it is *exclusively for families that own large family businesses and family offices*. Our venue will be the light-filled George V Hall in the historic Bloomsbury Hotel.

The Risk of Ignoring Tomorrow's Predictable Family Business Problems

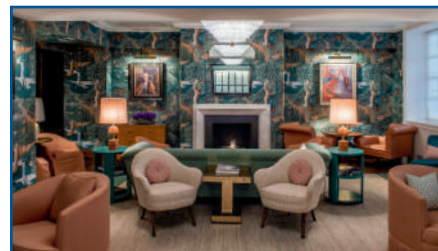
In the short-term, it is often easier to do the bare minimum on family governance, agreeing the least possible in family policies or succession planning. This approach avoids difficult discussions within your family. However, if you do not address these difficult questions, then problems build; family disputes or sudden crises become much more likely. By working on predictable problems in advance, your family can pre-empt or reduce them. This Forum shows you how.

Live Family Cases and World-Class Facilitator

The Forum is led by top family business expert Peter Leach of Imperial College London. What makes it unique is that it is built around *live family cases*, in which you hear, *live* from a family, then work in table-sized groups to discuss each case with other families. You learn from each other's hard-earned experience as well as from the world-class facilitator, who helps draw broader lessons.

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

Ian Partridge Founder and Chairman, Loedstar S.A.



THE BLOOMSBURY

WHO IS IT FOR AND WHY?

The Forum is designed to be relevant for *any family member*, whether or not you work in the business, and *any family* from *any country*. Here are some of the different things you will learn, depending on your own personal and family situation:

- ★ **It's all new to me:** Learn the first principles of common family business challenges and how to pre-empt them.
- ★ **We have basic governance and succession planning already:** How to create a process, involving the whole family, to expand what you have into something more comprehensive and resilient, with proper "buy-in" from family members.
- ★ **We have fully-developed governance and succession planning:** How these might be adapted to reflect your family's latest circumstances, while fully engaging the next generation.

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

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FAMILY BUSINESS FORUM

ANNUAL LOEDSTAR MEMBERSHIP AND REGISTRATION DETAILS

Overview

The Family Business Forum will take place in the **George V Hall at The Bloomsbury Hotel** on **Tuesday, May 23, 2023**. 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).

The registration link is at the bottom of this page, with *reductions* for *early registration* and *family groups*.

Registration – Loedstar Membership and Reduced Fee for Early Registration

To join the Forum, you must first become a member of Loedstar's network. Aside from being able to join *one* Forum, the free benefits of membership include: year-round support and advice on challenges that you might be facing; connections with other families to share experiences; access to family-to-family business opportunities and cost-saving initiatives; a one-on-one consultation with a family business expert; peer-to-peer group video calls (to help you address challenges that you face through discussion with other families).

The fee is £1,225 UK Pounds, **reduced by 20% to £980 if you register online by April 30, 2023**. If you register **after** April 30, it increases to the full fee of £1,225.

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

Additional Fee Reductions for Family Groups

We offer a family group reduction based on how many register together and it applies to everyone in your group, so it makes sense that *your group number includes everyone* you would like to become a member. If you are unsure, you can *confirm actual family member names later*.

Number registering together in a group:	1	2	3	4	5+
Fee reduction for everyone in the group:	0%	10%	15%	20%	25%

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:

Over 30 days:	0%
29 -15 days:	50%
Under 15 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.

Date and Timings

- **Forum date:** Tuesday, May 23, 2023.
- **Forum venue:** George V Hall and Coral Room at The Bloomsbury Hotel, London WC1.
- **Main sessions (George V Hall):**
Registration, welcome coffee from 8.30 am.
Introductions at **your table-sized group will begin promptly at 9 am**.
Forum discussions end at 6 pm latest.
- **End-of-Day Farewell Reception (Coral Room):**
Reception begins once Forum discussions end at 6 pm latest. Flexible ending around 8 pm.

Reserve your places now

To benefit from the **lowest fee, ending on April 30**, please [register her now for yourself and for your family group](#). For the *largest possible group reduction*, your stated *group number* should include *everyone in your group*. Important – if you are not yet sure who will be in your family group then *you can confirm the names later*.