

ONE-DAY 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:*



*Putting in place family governance and a family constitution
Keeping a family together and purposeful stewardship*

Family business speakers shown in order of appearance:

Mr Christopher Oughtred, Former Chairman, William Jackson Food Group
Ms Fiona Gunn, Chair, Development Advisory Group, William Jackson Food Group
Mr Alex Scott, Founder, Applerigg and Former Chairman, Sandaire
Dr Oliver Sargent, Chairman, Applerigg

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
Wednesday, 16 November, 2022*

MORNING SESSION

Working on a live family case in table-sized groups, you will learn how to put in place family governance, agree family guidelines and policies or, if you wish, create a full family constitution. You will hear how these must evolve to stay relevant

FAMILY AND BUSINESS GOVERNANCE



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 broader lessons and share his own ideas. His opening session will introduce key family business concepts that will be addressed in more detail by the speakers.

LIVE CASE IN TABLE-SIZED GROUPS – WILLIAM JACKSON PART I



One Family's Experience of Developing Family Governance and a Family Constitution

Mr Christopher Oughtred

Former Chairman, William Jackson Food Group

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.

He will begin the case in 1992, when the Oughtred family faced a difficult year for the family and business. The issues included deteriorating business performance, limited succession planning and poor communication between family and business. Participants will work in table-sized groups to consider what might have been done to resolve the situation

through better family governance and guidelines. Peter Leach will then bring the whole room together, hearing what the different tables each recommend, to come up with a range of possible solutions.

LEARNING FROM THE CASE – WILLIAM JACKSON PART II



GROUP DISCUSSION

What the Family Did and Lessons Drawn

Mr Christopher Oughtred

After the break, Christopher Oughtred will build upon the group discussions to outline what the Oughtred family actually did, drawing from his first-hand experience as a former Chairman.

He will review the process during which a family governance framework, and particularly a new family constitution within it, was gradually agreed and then implemented by G4 (fourth generation) and G5, later involving G6. Next, he will show how the constitution has been tested by real-life events since, such as the sale of major businesses and the acquisition of others. Christopher will conclude with lessons learned along the way.

WHAT'S NEXT? – WILLIAM JACKSON PART III



The Critical Role of Family Training and Development

Ms Fiona Gunn

Chair, Development Advisory Group, William Jackson Food Group

Looking forward, how can William Jackson ensure that its next generation (G6) is sufficiently knowledgeable, involved and motivated to handle future challenges?

To answer this question, Fiona Gunn will share her experiences with their Development Advisory Group (DAG). Its roles include: guidance for family members (*whether or not they intend to join the Group*); developing career paths for working family members and, finally, as happened recently, selecting family members for key appointments, including

Group Board members and the new Group Chair.

NETWORKING LUNCHEON

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

WEDNESDAY, 16 NOVEMBER – MORNING

In the afternoon, you will learn from a family that has gone through two major transitions, about how to keep a family together with a common purpose. This session is followed by a peer-to-peer advice and discussion workshop

AFTERNOON AND EVENING

LIVE FAMILY CASE: STAYING TOGETHER – THE SCOTT FAMILY PART I

What Happens When a Family Sells its Business?

Mr Alexander Scott

Former Chairman,
Provincial Insurance Company and Sandaire Investment Office



ALEX SCOTT



EARLY DAYS

Alex will explain how, in 1994, he took over as 4th generation Chairman of Provincial, then the UK's largest private insurer. Very quickly, he was confronted with significant strategic challenges; non-family directors advised the family to sell their inherited business. He will outline how the family successfully reinvested together, creating Sandaire, a multi-family investment office. Sandaire was sold in 2020 and chairmanship of the new family company, Applerigg, was passed to Alex's cousin, Dr Oliver Sargent. Participants will work together in table-sized groups to discuss the fundamental question of what holds a family together, besides its business.

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PURPOSEFUL STEWARDSHIP – THE SCOTT FAMILY PART II

Finding New Purpose and Maintaining Family Cohesion

Dr Oliver (Oli) Sargent

Family Chairman, Applerigg Limited



In 2020, Oli Sargent replaced Alex Scott and was appointed Family Chairman of Applerigg, the family holding company, to chart its new strategy.

In the second part of the case, Oli will outline developments since the sale of Sandaire, with the concept of "Purposeful Stewardship" being right at the core of the family's ongoing business ethos (one example is a collective family decision, made recently, to move to a fully sustainable approach for all investments). Applerigg focuses on preservation and growth, whilst having the responsibility to reinvent and innovate, so as to be relevant for the future (including investing in asset-backed businesses that offer a social service). Oli will explain how a family can find new purpose after a transaction and how cohesion can be maintained.

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 from the facilitator, Peter Leach. He will answer outstanding questions and draw broader lessons, 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

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



One-Day Family Business Forum The Bloomsbury Hotel, Wednesday, 16 November 2022

INVITATION: WHY YOU AND YOUR FAMILY SHOULD JOIN US



IAN PARTRIDGE

It is my great pleasure to invite you to our One-Day Family Business Forum in London. We have been holding these unique, focused learning experiences around the world since 2000 and, in that time, hundreds of families have joined us. The Forum is a friendly and safe environment, exclusively for families that own large family firms and family offices. Our venue will be the light-filled George V Hall in the historic Bloomsbury Hotel.

The Potential Risk

In the short-term, it is often easier to do the minimum on family governance, agreeing family guidelines or succession planning and so avoid potentially difficult discussions within your family. However, if you do not address these 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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ONE-DAY FAMILY BUSINESS FORUM

ANNUAL LOEDSTAR MEMBERSHIP AND REGISTRATION DETAILS

Overview

The One-Day Family Business Forum will take place in the **George V Hall at The Bloomsbury Hotel** on **Wednesday, November 16, 2022**. 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 1,100 Swiss Francs, **reduced by 20% to 880 Swiss Francs if you register online by October 31**. If you register **after** October 31, it increases to the full fee of 1,100 Swiss Francs.

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* (by November 7, 2022).

<i>Number registering together in a group:</i>	1	2	3	4	5+
<i>Fee reduction for everyone in the group:</i>	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:

<i>Over 30 days:</i>	<i>0%</i>
<i>29 -15 days:</i>	<i>50%</i>
<i>Under 15 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.

Date and Timings

- **Forum date:** Wednesday, November 16, 2022
- **Forum venue:** George V Hall and Coral Room at The Bloomsbury Hotel, London WC1
- **Main sessions (George V Hall):**
Registration, welcome coffee from 8.00 am. Main session begins at 9 am and ends at 5.00 pm
- **End-of-Day Farewell Reception (Coral Room):**
Begins once main session ends at 5.00 pm. Flexible ending, most likely around 7.30 pm