

Helping Family Businesses Succeed Since 1996



FAMILY TIES

A quarterly publication from the UW-Madison Family Business Center to help our members stay connected to each other and to the FBC.

2009-10 PROGRAMS

Held at the Fluno Center: 8:30-11:30 am OR 1:30-4:30 pm

#1 Tuesday, September 29, 2009

Managing Boundaries in the Family Business: Why, When and How Successful Companies Do It – and How Yours Can Too! Jane Adams

This presentation offers family business principles tools and strategies to leverage their individual and collective strengths to further their business objectives as well as their personal and relational goals.

#2 Tuesday, October 20, 2009

Developing Your Next Generation Leaders

Katherine Grady, Lansberg, Gersick & Associates LLC

In this forum, we look at the challenges each family business faces in the development of its future leaders. We examine methods for encouraging talented and interested family members to enter the business and governing roles.

#3 Tuesday, December 8, 2009

What Non-Family CEO's of Family Businesses Must Know to be Successful with the Family & in the Business

JoAnne Norton, Freedom Communications

Who should lead the family firm when a family member can't, won't, or shouldn't? Whether you are considering hiring a non-family CEO, becoming one, or working with one, this is a presentation that will provide insight as well as practical advice.

#4 Tuesday, January 12, 2010

Estate and Succession Planning for Family Business Owners: Modern Approaches Made Easy

Mark Bradley, Ruder Ware

You will learn how and when the transfer of assets--by lifetime gift or death time transfer--may be subject to the federal transfer tax system, how you can structure your estate plan to minimize your exposure to these taxes, and non-tax techniques.

#5 Tuesday, March 16, 2010

Once Upon a Family Legacy—video stories that spark a path to the future

Kathy Wiseman, Working Systems

8:30 am – 11:30 am OR 1:30 pm – 4:30 pm

Watch succession unfold on the screen as two families think about and experience the process of leadership succession in their family businesses. Excerpts of videos, filmed over an eight-year period, give viewers a front-row seat as the families manage their relationships, business demands, marketplace changes, and the process of aging.

#6 Tuesday, May 11, 2010: TBD...but save the date!

MEET DEB HOUDEN

The New FBC Director



**Deb Houden, FBC Director
Begins June 1**

Deb Houden, Ph.D., earned her bachelors, masters, and doctorate degree from the University of Wisconsin, specializing in communication, conflict resolution, and perceptions of fairness during succession in

family business. Active in the Family Firm Institute, she has also earned her Certificate in Family Business Advising, and serves on a special task force within FFI in chapter organization. She is also an active member in the Association for Conflict Resolution.

Deb has lectured in numerous courses at the University of Wisconsin, including Issues in Family Business; Communication and Conflict Resolution; and Introduction to Interpersonal Communication. She enjoys the varied backgrounds and the knowledge her students bring to the classroom. A

A huge thank you to the FBC Search & Screen Committee:
Eric Schwartz, Sara Investment Real Estate, Neil Fauerbach, Smith & Gestland, Londa Dewey, The QTI Group; Jim Johannes, School of Business, Joan Gillman, FBC, Joyce Fasanella, FBC.

firm believer in continuing education, Deb has also developed curricula and taught extensively in returning adult education programs. She has earned both her masters and doctorate

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DEB HOUDEN (continued from page 1)

degrees as a returning adult student, which allows her an understanding of the challenges faced by those who are working, yet want to continue their education. In addition to teaching, Deb has consulted with family businesses for the past three years, assisting family and non-family members in gaining better insight into their unique issues.

A deep belief in community involvement, Deb is a mentor with the Boys & Girls Club of Madison, and volunteers teaching public speaking to TOPs/AVID students at Madison East high school.

Married into a family business, Deb lives in Madison with her husband, three children, 2 dogs, 1 cat and 3 goldfish. Her husband is a graduate of UW Business School, and all family members are die-hard Badger fans of every sport. ♦♦♦

March 31 Members in the Spotlight



Morning Member in the Spotlight
Eric and Sara Schwartz
Sara Investment Real Estate



Afternoon Member in the Spotlight
Derrick and Susan Van Mell
Van Mell Associates

TAKE NOTE! Items of Interest

Family Inc.: TV series coming in June:

Family Inc., an engaging new television series that profiles successful family-owned companies, is set to join the line-up of innovative and entertaining television shows produced by Discover Mediaworks, based in Madison. Currently in development, the series will debut in June and air on television stations throughout the Midwest.

Youth Entrepreneur Camp: June 15-19:

<http://exed.wisc.edu/sbdc/specialprograms/yec/default.asp>

An opportunity to foster the entrepreneurial desires of middle school students.

Center for Philanthropy:

<http://www.philanthropy.iupui.edu/PhilanthropicServices/WPI>

Cutting-edge programs and initiatives dedicated to increasing the understanding of philanthropy and improving its practice through research, teaching, public service and public affairs.

Family Business WIKI:

<http://www.familybusinesswiki.org>

A new tool funded to create a publicly available resource for family businesses.

Family Business Town Square:

<http://familybusinesswiki.ning.com/>

Similar to a “Linked IN” or “Facebook” and allows members to contribute and engage in dialog around specific family business topics.

MEMBER/SPONSOR NEWS

New Members Welcomed in 2008-09:

- Brakebush Brothers
- Construction Resources Management
- Ganser Company
- Livable Communities
- MPC
- Nueske's Applewood Smoked Meats
- R.E. Golden Produce
- Van Mell Associates



Gerry Ring, founder of **Park Towne Development**, knows how to put vision into action. For this, Catholic Charities of Madison honored Gerry for his volunteer leadership by naming a roadway at the new All Saints Retirement neighborhood, *Gerry Ring Way*.

Our thoughts and prayers go out to Kerry McAllen, **McAllen Properties**. Kerry is being deployed to Iraq this summer with the 90th Sustainment Brigade of the US Army Reserve.



Congratulations to next generation parents, Sarah and Avery Johnson, **Zimmerman Plumbing**. Their second child, Oscar, was born March 28.



Tom Gialamas, **The Gialamas Company**, and Kerry McAllen, **McAllen Properties**, were named as people to watch in "40 Under Forty" by *In Business* March issue.

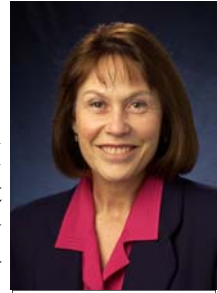
Diane Ballweg, **Endres Manufacturing**, will be in Dingnan, China this summer teaching conversational English to eager Chinese.



For the third consecutive year, **ABC Supply Co. Inc.** has been honored with the Gallup Great Workplace Award. The company is one of only 23 companies in the world to receive the 2009 award. Also, congratulations to Brent Fox, recently promoted to VP-Divisional Operations, and Kim Hendricks named to the newly created position of VP-Organizational Development.

FBC CENTER NEWS

A Good Bye from Joyce Fasanella FBC Outreach Administrator



Joyce Fasanella

It's been nearly seven years since I began my journey with you, and it is almost impossible to put my feelings into words about how great it has been to get to know all of the FBC Members and Sponsors. These memories will stay with me forever.

I feel extremely fortunate to have worked with Ann Kinkade. She taught me so much, and we certainly shared a lot of laughs and even a few tears together. Joan Gilman, who acted as Interim Director these past few months, has also been an inspiration as she once again took part in hiring another outstanding FBC Director, Deb Houden. It makes it easier to retire knowing that the Center will be in good hands under Deb's leadership!

Many of you have asked what my plans will be when I am no longer spending most of my day at the FBC! One thing you have reinforced in me is that family is very important. I will be spending more time with family in Green Bay, making more trips to Colorado to visit our daughter, enjoying bicycling with our son here in Madison, and quality life with my husband, John!

I sincerely hope our paths cross often, and that I read many articles about your continued successes. ♦♦♦

Family Business Women

Where: Great Big Pictures
5701 Manufacturers Drive, Madison
When: Tuesday, May 19, 11:30 a.m.-1:00 p.m.
What: Tour, family business story, lunch, networking
Register: Call 441-7347

Potential members may attend one event as a guest. To become a member of the group, the guest family business must be a member of the FBC.

Food for Thought

A Members-only Program Presented by FBC Sponsors

Where: Fluno Center, 8th floor Skyview Room
When: Wednesday, May 27 from 7:00-9:30 a.m.
What: *Financial Aspects of Generational Succession Planning*. Breakfast and presentation by Associated Bank, and Mosley, an Independent Investment Firm
Registration: Required! Call 441-7347 or go online at:
<http://exed.wisc.edu/fbc/programs/foodforthought.asp>

FAMILY BUSINESS CENTER SPONSORS

A special thank you is extended to the following sponsors. These businesses provide the Center and its members not only with necessary financial support, but also with expertise in family business issues and a commitment to the cause of family businesses. If you have questions, they can help.

FOUNDING SPONSORS

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2009 Summer Tailgate *Succeeding since the American Revolution!*

Presenter: Lansing Crane, former CEO & Chair
Crane & Company
Location: Memorial Union, Tripp Commons
Date: Tuesday, July 14
When: 5:45-9:00 p.m.

While few family businesses master the challenges of succession, Crane & Co.—founded in 1801 and now in its seventh generation—has done just that! This summer's Tailgate features former CEO and sixth-generation leader Lansing Crane who will describe how the Crane family has beaten the succession odds by professionalizing the family firm, managing the pace of strategic and technological change, preparing family members for leadership, providing strategic liquidity to its owners, and staying "green" for over 200 years.

To Register:

- Online: <http://exed.wisc.edu/fbc>
- Call: (608) 441-7347

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