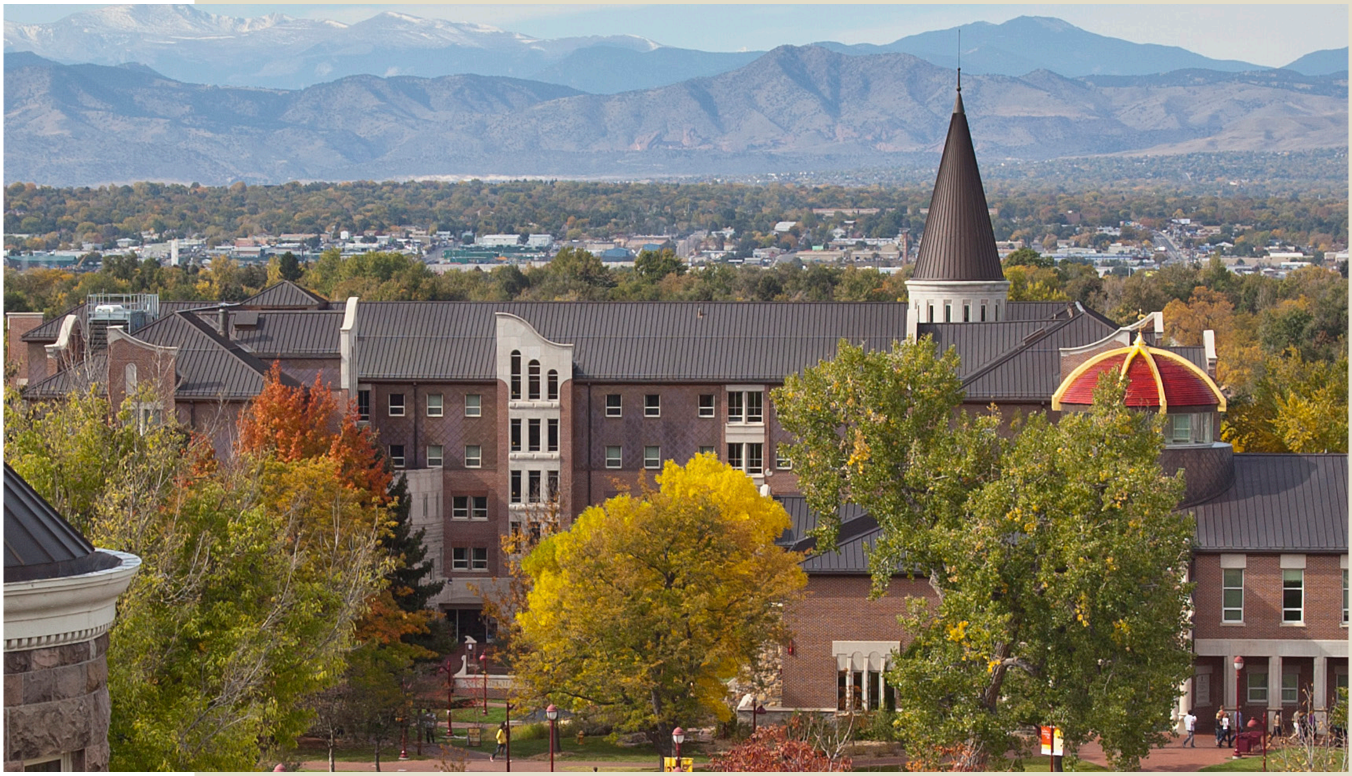
BAILEY PROGRAM FOR FAMILY ENTERPRISE

Cultivating Family Legacy

A Wealth 3.0 Approach



Bailey Program for
Family Enterprise
UNIVERSITY OF DENVER

OVERVIEW

In this interactive workshop, participants will learn how to leverage an integrative approach to advising family offices –whether their own or others—towards the best outcomes for multigenerational wealth and family unity. They will engage in presentations, case studies and interactive activities.

Topics include intergenerational dynamics, coaching high net worth families, conflict resolution, estate planning, legal and tax concerns, governance and boards, behavioral finance and portfolio management.

The class is comprised of carefully selected individuals from families of wealth and family office executives who experience similar challenges and opportunities. Faculty are highly respected leaders in their fields who bring practical experience, research and though leadership to families and their advisors.

Leveraging the 10 Domains of Family Wealth framework from the UHNW Institute, "Cultivating Family Legacy" at the Daniels College of Business is a unique, leading-edge program for those who know that wealth is much more than money and that families need a holistic approach to manage the vital legacy they steward.

WHAT IS WEALTH 3.0?

"As an inherently multidisciplinary field, family wealth advising should deepen and formalize its integration with its companion professions of finance, estate planning, family business consulting, risk management, philanthropic advising, sociology and psychology. Academic and professional training programs should develop core curricula in scalable fashion to produce a new generation of advisors with the skills clients deserve and demand. Cross-discipline training will help foster integrated team functioning, an increasingly important prerequisite for working at the highest levels of the field."

From an article by Jim Grubman PhD, Dennis Jaffe PhD, and Kristin Keffeler MSM, MAPP

Link to article

OBJECTIVES

In this three-day workshop, participants will learn how to:

- Navigate intergenerational family dynamics for long-term success –personally, relationally, and financially
- Use needs based planning and behavioral finance to align resources and determine courses of action for success
- Make better investment decisions using behavioral finance to power family wealth portfolios into the future
- Leverage effective governance to ensure continuity, reduce risk and increase communication within complex family structures
- Navigate the legal and tax systems proactively with the latest information
- Leverage a Wealth 3.0 perspective to meaningfully support families (yours or others) as a trusted advisor
- Gain deeper understanding of each of the 10 Domains of Family Wealth, for your professional development and upskilling as a holistic Family Office practitioner

WHO SHOULD ATTEND

Participants are carefully selected and include individuals from families of wealth and family office executives who share similar issues. Roles include:

- Family enterprise members responsible for stewarding their family's wealth
- Family office professionals seeking to expand and deepen their skill at advising families

This workshop is not appropriate for investors and/or advisors not representing a family's interests.

PARTICIPANT BENEFITS

ACTIONABLE LEARNING

- Relevant learnings you can immediately apply to support those you support and advise.
- Faculty use case studies and storytelling to encourage thoughtful, interactive learning.

FAMILY ALIGNMENT

- Align family purpose values, mission and goals.
- Add Family Office executive education to your resume.

PEER LEARNING

- Exchange ideas with peers on a similar journey (aided by small group breakouts).
- Establish connections with experienced professionals.

NAVIGATE CHALLENGES

- Glean insights on how other family offices have navigated challenges.
- Improve the financial and relational outcomes of your enterprise.

FACULTY

This workshop relies on the expertise of a community of professionals in the family enterprise space.

Griffin Bridgers JD., LL.M
Of Counsel, Hutchins & Associates LLC

Lambert Bunker
Vice President, AthenaInvest, Inc.

Karl Frank, Certified Financial Planner®, CFP®, MSF, MBA, MA
President, A&I Financial Services LLC

C. Thomas Howard, PhD
CEO and Chief Investment Officer, AthenaInvest, Inc.

Kristin Keffeler
Chief Learning Officer, Johnson Financial Group
Founder and Principal, Illumination360

Joshua Nacht, PhD
Senior Consultant, The Family Business Consulting Group

AGENDA

DAY 1 - WELCOME

5:00 p.m. - 6:00 p.m.	Introduction, Activity, Happy Hour
6:00 p.m. - 8:00 p.m.	Dinner and Guest Speaker – Taylor Kirkpatrick, CEO Babson Farms, shares stories and learnings from leading his family enterprise

DAY 2 - WEALTH 3.0 ADVISING

Faculty: Kristin Keffeler

9:00 a.m. - 10:30 a.m.	Wealth 3.0 and the 10 Domains of Family Wealth
10:30 a.m. - 10:45 a.m.	Break
10:30 a.m. - 12:00 p.m.	Rising Generations, Family Systems
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:30 p.m.	Coaching and Communications Skills for Advising Families
2:30 p.m. - 2:45 p.m.	Break
2:45 p.m. - 4:00 p.m.	Coaching and Communications Skills for Advising Families (continued)

Please note, it is possible that this agenda will change based on faculty priorities, schedules and learning objectives. This agenda is meant to give an idea about the topics which will be covered in the workshop.

AGENDA
Continued

DAY 3 - BEHAVIORAL FINANCE, WEALTH MANAGEMENT & ESTATE PLANNING
Faculty: Tom Howard, Lambert Bunker, Karl Frank & Griffin Bridgers

9:00 a.m. - 10:30 a.m.	Behavioral Portfolio Management with Tom Howard, PhD
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. - 12:00 p.m.	Behavioral Wealth Management Model with Lambert Bunker
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:00 p.m.	Practitioner Application with Karl Frank
2:00 p.m. - 2:15 p.m.	Break
2:15 p.m. - 3:30 p.m.	Estate Planning and Partnering with Legal/Tax Professionals, with Griffin Bridgers
3:30 p.m. - 4:00 p.m.	Panel Q&A with all four faculty

DAY 4 - GOVERNANCE
Faculty: Joshua Nacht, PhD

9:00 a.m. - 10:30 a.m.	Governance Essentials:
	Critical role of governance in family enterprises
	Boards and family governance
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. - 11:45 a.m.	Roles, Responsibilities and Boundaries
	Decision Making
	Action plan for your unique situation
11:45 a.m. - 12:00 p.m.	Wrap Up with Helena Karchere

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ABOUT US

TRANSFORMATIONAL LEARNING

At Daniels Executive Education, we believe that investing in people transforms organizational performance. That is why we proudly offer life-changing learning opportunities, powered by the top-ranked Daniels College of Business, the eighth-oldest business school in the nation.

Each year, Daniels Executive Education partners with dozens of organizations and hundreds of clients to accelerate capacity to create measurable results and lead with purpose.

53+

years Daniels has offered transformational learning through Executive Education.

98%

of participants would recommend their Executive Education program to a colleague.

928

professionals were involved with Executive Education last year.

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