

STEP Half-Day Conferences



Business Families Special Interest Group

Thursday 5 December 2013, Park Plaza Hotel London Victoria, 239–251 Vauxhall Bridge Road, London SW1V 1LJ, United Kingdom

CONFERENCE

Women and the Family Business: Roles, Goals and Considerations for Advisors

EVENT FOCUS

The world is currently experiencing the early stages of a global tsunami of wealth transition where the unprecedented entrepreneurial fortunes created in the second half of the 20th Century are passing to the next generation. As part of this, women are set to inherit wealth in never-before-seen levels.

The Business Families Special Interest Group will consider the role women play today in family enterprises as employees, managers, directors, owners and founders, and how advisors can facilitate a business owning family's navigation of gender and generational challenges.

A group of specialist advisors from around the world will be joined by women executives and entrepreneurs to explore leadership styles, cultural drivers, inter-generational dynamics, husband-wife co-preneurship, respective roles in dispute resolution, working and parenting. It will also address the legal aspects of ownership, employment, governance and estate planning in relation to gender.

WHY ATTEND?

More and more of our clients are women. More and more boards and executive suites are populated with women. Join us to explore how to provide the best advice and support for this trend. Speakers will share their insights into how families are organising themselves, best practices, and how to leverage the special opportunities that arise out of increasing roles for women.

12.15pm – 1.00pm

1.00pm

1.00pm – 2.00pm

2.00pm – 2.05pm

2.05pm – 2.15pm

2.15pm – 3.10pm

3.10pm – 3.35pm

3.35pm – 4.05pm

4.05pm – 4.55pm

4.55pm – 5.25pm

5.25pm – 5.40pm

5.40pm – 5.45pm

5.45pm

Annual General Meeting of the Business Families Special Interest Group

Close

Guest Arrival, Registration and Networking Buffet Lunch

Chairman's Welcome Address

Chris Lintott TEP, Partner – Private Client, Penningtons Manches LLP

Women in the Family Business: What the Data Shows

Mark Evans, Managing Director-Strategic Solutions, Couetts Institute

Perspectives on Being a Woman in a Family Business

Panel discussion followed by questions & answers

· Chair: Peter Leach, Chairman and Founding Partner, Peter Leach & Partners LLP

· Miranda Ballard, Co-Founder, Muddy Boots Real Foods Ltd

· Mary Duke TEP, International Family Wealth Specialist

· Elaine Fairfax, Managing Director and Founder, Animal Friends Insurance

· Juliette Johnson, Family Business Advisor, Facilitator and Educator

Leadership, Values, Roles and Attitudes

Ian Marsh TEP, Specialist in Family Dynamics and Communication, *familydr*

Break

Legal Aspects:

– Partnering Into and Out of the Family Business

– Governance of the Family Business

– Employment Law Issues in a Family Business

Glafkos Tombolis, Partner – Corporate Practice, Kemp Little LLP

Sara Wilson, Legal Director, Charles Russell LLP

Cultural Issues

William Ahern TEP, Principal, Family Capital Conservation Limited

Mary Duke TEP, International Family Wealth Specialist

The Advisor Perspective

Juliette Johnson, Family Business Advisor, Facilitator and Educator

Chairman's Closing Remarks

Chris Lintott TEP, Partner – Private Client, Penningtons Manches LLP

Conference Close

Delegate Fee

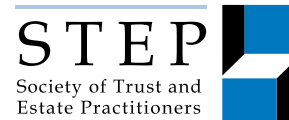
STEP Members £95

Non-members £115

Accredited for 3 hours

STEP and SRA CPD

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Register online today at www.step.org/half-day-conferences

Registration Information

Register online today at www.step.org/half-day-conferences

Annual General Meeting 2013 of the Business Families Special Interest Group

Preceding their afternoon conference the Business Families Special Interest Group will also hold their annual general meeting which will be open for attendance by members of the special interest group, the group's steering committee, and any other interested persons. Discussion at this meeting will focus on plans for the year ahead and will be an opportunity to input into the group's planned 2014-15 activities. If you wish to attend, please indicate this when registering for your chosen conference at www.step.org/half-day-conferences

Payment

EVENT CODE: 5013

Delegate Rates

STEP Members: £95

Non-members: £115

PLEASE REGISTER ONLINE AT WWW.STEP.ORG/HALE-DAY-CONFERENCE

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Payment by credit card is by Visa & Mastercard only.

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Terms and Conditions

Registration Fee

The event registration fee includes participation in the conference, refreshments and documentation material. All bookings are considered binding on completion of the registration form.

Cancellations

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of £30.00. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full event fee. Substitutions may be made at any time provided the organisers are notified prior to the conference. Please note that if a non-STEP member attends in lieu of a STEP member the difference in fees will be charged.

Event Documentation

Please note that in order to reduce the environmental impact of the event, event documentation may be provided electronically, rather than in printed copy. If this is the case, registrants will be provided with the details to access this.

If you are unable to attend the event and would like to purchase an electronic copy of the event documentation, you can do so by emailing orders@step.org. A charge of £25.00 will apply. Electronic copy is sent after payment has been received. Event documentation contains notes from those speakers who provide them.

Accreditation

The event is accredited under the CPD/CPE schemes as follows, subject to the appropriate claim being made by the delegate: Society of Trust and Estate Practitioners - 3 hours structured training. The SRA - 3 hours structured training.

Disclaimer

It may be necessary for reasons beyond control of the event organisers to alter the content and timing of the programme or the identity of the speakers.

Society of Trust and Estate Practitioners

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