

Family & Closely Held Business Summit 2017

Speaking Engagement

Potawatomi Hotel & Casino; Milwaukee, WI
July 12, 2017

We will be participating in the *BizTimes Media's* Family & Closely Held Business Summit. This forum will provide an extensive overview on how to navigate many of the complex issues related to growing a successful and sustainable family and closely held business. Attendees will learn from family business owners on a variety of topics ranging from culture, growth, transitioning, sustained success, and legacy.

The keynote speaker for this year's summit will be Tom Deans, New York Times best-selling author of *Every Family's Business*. Following the speaker will be an informative panel discussion featuring family and closely-held business owners featuring: Ken Riesch, Co-founder, Owner and President of R&R Insurance, along with Jack Riesch, Owner and Executive Vice President of R&R Insurance. The summit will conclude with attendees having the opportunity to select and participate in four out of 20 roundtable discussions covering the core themes gathered from the program: Growth, Leadership & Culture, Next Generation and Legacy.

We will offer the following roundtable discussions during the program:

Planning for Transition in Your Family Business, Jacqueline L. Messler

Business owners are often so focused on building and sustaining the business, that they neglect to plan for their exit from the business. When planning for your eventual exit from the business, it is important to incorporate your objectives — whether cash flow, wealth accumulation, continued occupation, or legacy. It is necessary to recognize your obligations under existing business agreements, if any, and consider whether they should be updated to accomplish your personal and professional goals. Your estate planning documents must also be coordinated with such agreements and objectives. Most often, early planning facilitates a smoother transition of your business and leaves more planning options on the table.

Managing Non-Competes – Are Yours Enforceable?, Laurie E. Meyer

Whether starting a business or improving the practices of your long-time company, you have an opportunity to add value to your business by restricting certain employees from joining a competitor and/or sharing your proprietary knowledge. In recent months, several court decisions have tightened the reins on what provisions are enforceable within non-compete agreements. If you have not

PROFESSIONALS

Jacqueline L. Messler
Partner

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Partner

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audited your non-compete agreements as of late, now is the time to do so. Laurie Meyer provided insights on how to protect your company's interests through restrictive covenants.

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