

FAMILY BUSINESS Communicator

WINTER 2019

Conway Center Celebrates 20th FAMILY BUSINESS AWARDS & EXPO

We had a wonderful celebration of family businesses at our **20th Annual Awards Program** on November 14, 2018. More than 500 guests celebrated another year of family business success at the Hilton Easton. Chas McCurdy from Kimball Midwest accepted the Family Business of the Year Award on behalf of his family and business with excellent advice on seeking outside counsel to help navigate the succession process. Dr. John Swartz, founder of Lake Shore Cryotronics and winner of the Lifetime Achievement Award, spoke graciously about the importance of failure and perseverance in life, family, and business during his acceptance speech.

More than 50 Conway Center member family-owned businesses and service providers showcased their products and services to attendees at the fifth annual **Family Business Expo**, held in conjunction with the Awards Program. The exchange of ideas and resources was really quite powerful! This is another great example of the networking and relationship-building opportunities available to our members.

This Conway Center signature event is made possible by our generous sponsors. We thank them for their continued support of the Center and of Central Ohio family businesses. They are: Dispatch Media Group, First Merchants Bank, Gryphon Financial Partners, Ricart Automotive, Taft/, and White Castle. In addition, Citicom provided printing and signage for the event and Artina Promotional Products sponsored award trophies. As a non-profit organization, we are grateful for the support of each organization.



Numbers correspond to list of Award Winners on page 4.

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Executive Director

CONWAY CENTER UPDATE

A few highlights from the year:



20th Anniversary & Hall of Fame saw 20 outstanding family-owned companies inducted into the first-ever Central Ohio Family Business Hall of Fame. The evening event was attended by over 400 family and community business leaders and short video vignettes were shown of each company. Our founders, Dick Emens and Bea Wolper, were interviewed by 10TV's Angela An and spoke about the history and impact the Conway Center has had in the community for the past 20 years.



Nine educational programs and four quarterly roundtables were presented to family business leaders on topics ranging from diversification, succession planning, and the impact of marriage on the family business, to name just a few. Family business leaders and service providers shared experiences, expertise, challenges, and successful business strategies throughout the year.



Social and networking events enabled members to build relationships and get to know each other better. Family Business Night at the Columbus Clippers, our annual golf outing, and the 15th Annual Family Business Tour and Networking Event at Jet Container, provided opportunities for multiple generations to interact while enjoying different activities. We continue to hold Next Gen Mixers and the CEO Peer Groups had a few fun outings (axe throwing and duck pin bowling) as well. Due to popular demand, we will have two Family Business Tours in 2019!



The 20th Annual Family Business Awards Program and Expo was well attended by family business and community leaders and celebrated the success of 29 family businesses and supporters. The Expo showcased Conway Center family businesses and service providers who displayed and demonstrated their products and services to a large and diverse crowd of family business leaders.



Ten Peer Groups, the "heart" of the Center's mission to help family businesses transition to the next generation, continue to grow in attendance and offerings. They include: CEOs, Finances for Family Businesses, Human Resources, Ignite Your Family Business (marketing-focus), Leadership Development, Next Generation Leaders, Non-Family Leaders, Online Strategy, Succession Planning, and Women in Family Business.



We are pleased to announce that the **Board of Trustees has named Jill Hofmans Executive Director and Vice President of the Conway Center**. First joining the Center in 2013 as part-time executive coordinator, where she primarily organized and executed peer group educational programs, she quickly expanded her job functions to include strategic planning for social media campaigns, membership development - including spearheading a diversity initiative - and developing creative fundraising events and opportunities.



Conway Center membership now includes well **over 200 family business and 30 service provider members**.



The Center's family business members together have **more than 25,000 employees in Central Ohio**.

The Conway Center for Family Business continues to grow and have a meaningful impact on the Central Ohio business community thanks to the efforts of many people – especially the generosity of the Conway family, the outstanding Center staff, the counsel and commitment of the Trustees and the Advisory Board, and the efforts of many family business and service provider members, who are active participants and advocates for what we do.



Meet the Staff



Jill Hofmans

Executive Director & Vice President

Jill is celebrating 6 years with the Conway Center and was recently named Executive Director and Vice President after serving 3 years as Managing Director. She is responsible for the overall operations of the Center and facilitates one of the CEO Peer Groups. She has a passion helping others and does so through connecting people to resources and each other. In her spare time, she hangs out with her two teenagers (when they let her), does irreverent cross stitching, and throws silly, themed parties in her home. Her favorite color is orange and her favorite animals are aardvarks.

Contact Jill: JHofmans@FamilyBusinessCenter.com or 513-504-3167



Amy Dotts

Event Manager

Amy has been with the Conway Center for 3 years and runs our many peer group programs and the Family Business Expo. After working at a non-profit healthcare organization for over 25 years, her passion for business, education, and people made her role at the Center a perfect job transition and fit. She enjoys spending time with her two grown kids and feels fortunate that they are close enough for frequent visits but are out of the house. Amy loves the outdoors and she and her husband of 30 years can often be seen walking or biking around town stopping at several restaurant/bars along the way.

Contact Amy: ADotts@FamilyBusinessCenter.com or 614-847-0160



Kelly Zwink

Membership Coordinator

Kelly joined the Conway Center in 2018 and is responsible for advancing the Center's mission and supporting both existing and potential members. Kelly was with The Ohio State University for almost 10 years and has a passion for building relationships and making connections with people. When not supporting Conway members, she spends time with her two young sons having light saber battles and trying to avoid building Legos. She loves to read, is refining her cooking skills, and you may see her jogging, very slowly, in her Grandview neighborhood.

Contact Kelly: KZwink@FamilyBusinessCenter.com or 614-395-7620



J. Richard "Dick" Emens

*Co-Founder and President,
Conway Center for Family Business*



Bea Wolper

*Co-Founder; President of Emens
& Wolper Law Firm*

To join, please contact Kelly Zwink, Membership Coordinator or visit
www.familybusinesscenter.com/membership/family-business-membership/

FAMILY BUSINESS OF THE YEAR

Kimball Midwest **4**

LIFETIME ACHIEVEMENT

Dr. John Swartz, Lake Shore Cryotronics **1**

COMMUNITY ENGAGEMENT

Happy Chicken Farms **10**

PRESIDENT'S AWARD FOR COMMUNITY ENGAGEMENT

Angela An, 10TV **3**

MILESTONE ACHIEVEMENTS

*1 millionth ticket**15 years**25 years in Central Ohio**25 years**25 years**30 years**30 years**35 years**40 years in Central Ohio**40 years**50 years**50 years**50 years**55 years**60 years**65 years**65 years**65 years**95 years*

EasyIT

Environmental Pest Management

Hylant

Integrated Building Systems **6**

TWO MEN AND A TRUCK® Columbus

Shaffer Entertainment

Spartan Logistics

Ohio Power Tool

The Gordon Flesch Company

Miles-McClellan Construction Co.

Acloché **7**

Insurance Agencies of Ohio

Lake Shore Cryotronics

Donatos Pizza **11**Crestview Rehabilitation &
Skilled NursingHappy Chicken Farms **10**

Martin Painting & Coating

Ricart Automotive

Kimball Midwest

NEXT GEN

D. Thor Hess, J.D. — Southeastern Equipment Company **9**

RISING STAR

Kimmi Wernli — Crazy Richard's Peanut Butter Company **2**

RE-INVENTION

Anderson Aluminum **12**

SUCCESSION PLANNING & IMPLEMENTATION

Under 50 Employees: Skilken | Gold Real Estate Development **8***Over 50 Employees:* TWO MEN AND A TRUCK® Columbus **5**

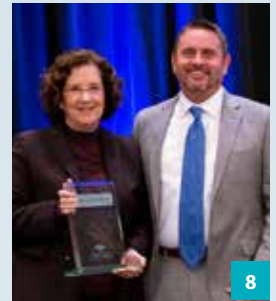
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20TH ANNUAL

FAMILY BUSINESS

Awards & Expo



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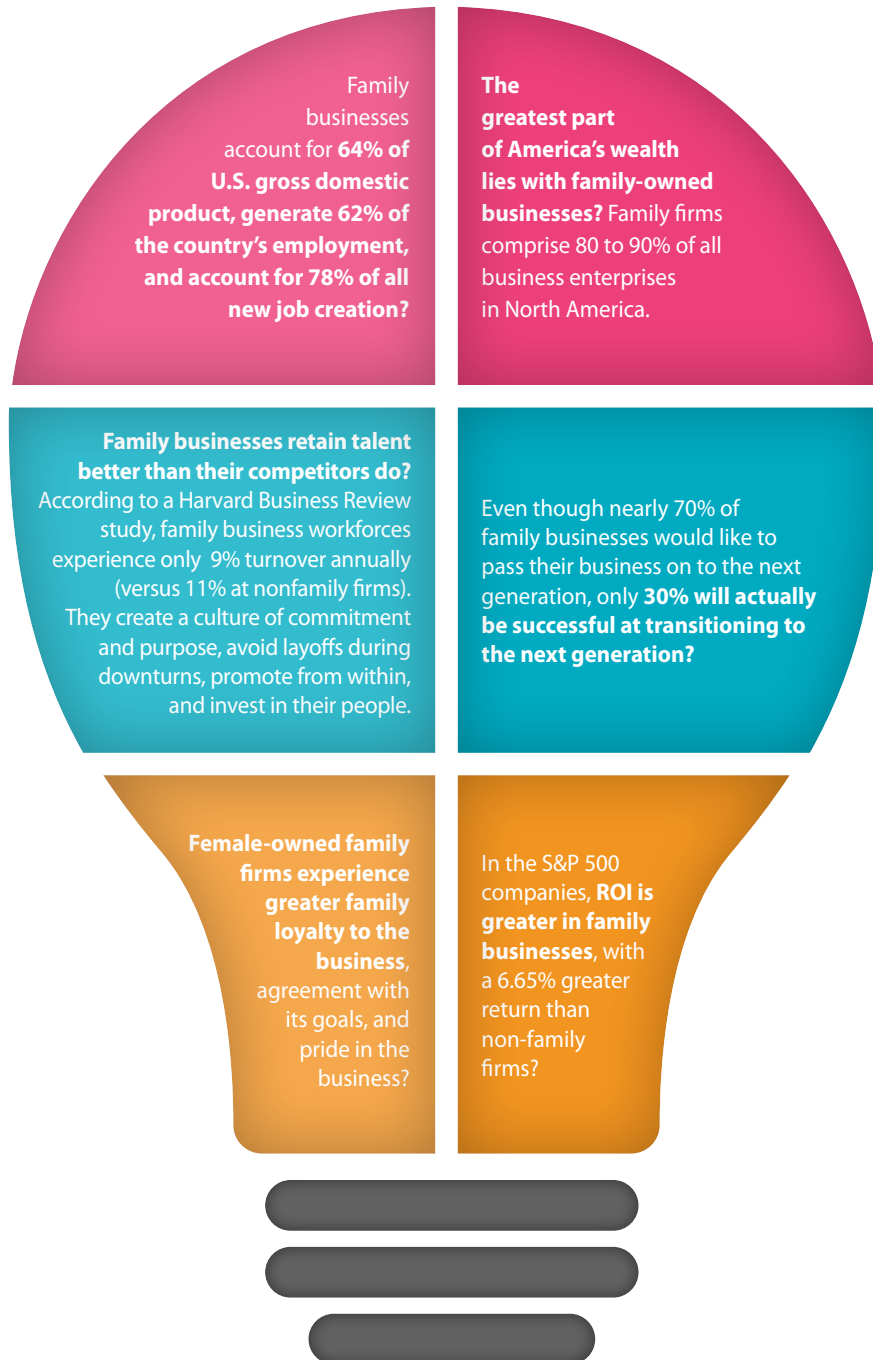
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DID YOU KNOW?

When many people hear the word “family business” they think small, mom-and-pop shops. But, did you know that....



Now you know! Family-owned businesses are economic powerhouses and the backbone of our nation's economy. Family-owned businesses deal with the same issues as other companies, but added “family relationships” puts a unique twist on how ownership, management, and growth are handled. We are here to help!

For more facts and information about family owned business, visit the Family Facts page on our website: <https://bit.ly/2RudCXX>

MEMBER *Spotlight*



JOHN MARTIN

*President, Martin Painting & Coating
– Founded in 1953 –*

Why did you join the Conway Center?

For the education, resources and relationships surrounding family business matters.

What are you most looking forward to in 2019?

Leadership development and training within our organization.

What about your family business keeps you up at night?

The need for talent and skilled workers.

What one piece of advice would you give other family business leaders?

Most family businesses work better when ownership is held by those working in the business.

MEMBERSHIP BENEFITS

614-253-4820 • info@familybusinesscenter.com • FamilyBusinessCenter.com

EDUCATION



10 peer groups

9 monthly education programs

4+ roundtables

Join a Peer Group

- CEO - East & West
- Finances for Family Businesses
- Human Resources
- Ignite Your Business
- Leadership Development
- Next-Generation Leaders
- Non-Family Leaders
- Online Strategy
- Succession Planning
- Women in Family Business



Share experiences, expertise and advice at Peer Groups



CULTIVATE RELATIONSHIPS



NETWORK AT EVENTS AND PROGRAMS WITH

- Owners
- Family Members
- Leaders
- Employees

Family Business Night at The Clippers

Family Business Tour and Networking Events

Annual Golf Outing

BUSINESS PUBLICITY



Publicity if chosen as award nominee



- **Company listed** on our website
- **Member spotlight** in print newsletter
- **Testimonials** on website and in newsletter



Work with media who have a desire to interview reps of family-owned businesses.

Columbus Dispatch

Columbus CEO





JOIN US!

Conway Center Educational Programs are hosted by:



The Conway Center for Family Business is a 501(c)(3) organization, established in 1998.

How to Prepare to Exit Your Business

As a business owner, you've devoted your career to building your company. Now is the time to plan for what comes next: spending more time with your family and pursuing new challenges. But, how do you prepare for a transition that is among the most complex events of your life?

Creating and growing a successful business is seldom just about money, nor is the decision to exit the business. The process is intense, the details are complex, and the decisions are often an unexpected combination of personal and financial.

You may be wondering, "When should I start developing my exit or succession strategy?" Arguably, the answer is always "now." The earlier you begin preparing for your exit, the likelier it is that your plan will be a success. Even if you don't plan to retire anytime soon, it's a smart idea to carve some time out of your busy schedule to think about how you wish to transition to your business.

Consider these five reasons why you should start planning for the transaction of a lifetime now:

1. There's no time like the present.

Regardless of how you intend to transition your business, it takes time to organize and implement a succession plan. If you plan to transfer your company to a family member or an employee, you will need time to train your successor. If you decide to sell, you will need time to find the right buyer.

2. Your exit from your business will affect your retirement and tax planning.

Can you afford to step away from the company, or will you need income from your business to support the retirement you envision? Your answers to these questions may affect how and when you transition your business.

Business succession planning also has an impact on tax planning. A succession plan that makes effective use of federal gift and estate tax exclusions and exemptions can help minimize taxes and help ensure that your family and key employees are well taken care of.

3. The earlier you start, the more control you have.

The longer you wait to organize a succession plan, the fewer options you will have on how to transition your business. Most business owners want to provide continued income for their families and maintain jobs for their employees. They may also hope to establish a personal legacy through continuation of their business or a contribution to a cause that is close to their heart. By planning ahead, you can retain more control over the outcome and help ensure that your business continues to operate according to your vision and values.

4. Your succession plan can affect the value of your business.

All too often, business owners put off succession planning until a medical condition or other life event forces the issue. If you were to become disabled, your disability could negatively impact the value of your business. In addition, trying to plan for succession during a time of crisis or stress could lead to emotional or reactive decision-making. Considering all possible scenarios in advance enables you to make rational decisions that help preserve the value of your business, even if you're no longer at the helm.

5. Planning ahead help you prepare for the transition.

Exiting your business isn't easy, especially when you have dedicated so much to making it a success. As you think about giving up your role, you may find yourself struggling with the idea of giving up control. You may also feel at a loss as to how to redefine yourself outside the context of your business. A good succession plan helps you and your employees prepare for a time when you will no longer be in charge.

Succession planning can be a complex and emotional undertaking, but its reward is watching your business continue to grow and succeed after you've passed the torch. As you work on your succession plan, be sure to seek the counsel of outside advisors, such as your accountant, attorney, Financial Advisor and/or insurance professional, so that you understand the tax, legal and financial implications of your plan.

Article by Morgan Stanley and provided courtesy of Michael Beers, Morgan Stanley Financial Advisor.

If you'd like to learn more, please contact:

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MEMBER Spotlight



CHIP CHAPMAN

*President, Integrated Building Systems
– Founded in 1993 –*

Why did you join the Conway Center?

We joined the Conway Center to learn best practices from our family business peers. Hands down, the Center's educational programs and small-group sessions deliver.

What about your family business keeps you up at night?

Our company is growing, and in a tight labor market it's a challenge to find good people who can help us continue to grow.

What one piece of advice would you give other family business leaders?

If you don't have an effective management system, consider EOS—the Entrepreneurial Operating System, which we learned about at Conway events. EOS gets everyone pulling in the same direction, focused on the same vision.

2019 MONTHLY EDUCATIONAL PROGRAMS

JANUARY 17

Community Engagement: How/Why to Do It and How It Can Impact Your Family Business

(Sponsored by GREENCREST)

FEBRUARY 21

Sales: How to Build a Sales Structure that Delivers Results for Your Family Business

(Sponsored by Key Bank)

MARCH 21

The Currency of Culture: Relationships with People

(Sponsored by GREENCREST)

APRIL 18

It's Not If, But When: Cyber Security Best Practices to Protect Your Family Business

(Sponsored by GREENCREST)



MAY 16

Re-Invention & Innovation Case Studies: How to Keep Your Family Business Competitive in the Marketplace

(Sponsored by Key Bank)

SEPTEMBER 19

Compensation Strategies: Best Practices for Retaining Family & Non-Family Employees

(Sponsored by GREENCREST)

OCTOBER 17

Bringing the Next Gen into the Family Business: Who, When, How?

(Sponsored by Key Bank)

NOVEMBER 21

Sticky Issues for Senior Family Business Leaders

(Sponsored by GREENCREST)

DECEMBER 19

How Digital Marketing can Help Grow Your Family Business

(Sponsored by Key Bank)

2019 QUARTERLY ROUNDTABLES

Q1 Strategic Planning for the Family Business

Q2 Business Valuation Best Practices

Q3 Estate Planning Best Practices

Q4 Year-End Tax Update



2019 EVENTS & NETWORKING

MAY 9

Family Business Tour & Networking Event at Sutphen

(Sponsored by Key Bank)

JUNE (TBD)

Family Business Night at the Columbus Clippers

JULY 22

6th Annual Golf Outing and Auction

AUGUST 8

Family Business Tour & Networking Event at Robin Enterprises

NOVEMBER 13

21st Family Business Awards & Expo



2019 PEER GROUPS



Why Join a Peer Group?

Peer groups provide a confidential environment for idea exchange, family business education, and personal growth. Learn and seek advice from your peers and professionals who have “been there, done that.” Each peer group has a shared purpose and agreed upon expectations. Open to any employee of a member business — not just family members!

CEOs

Non-competing family business CEOs come together to discuss business, personal or family business related issues. Participants can seek input and advice while discussing executive level business issues. **Groups meet monthly at different locations as posted.**

Additional fee to attend.

Finances for Family Business

Explore topics in financial literacy and asset management. Topics include applications in financial planning, portfolio management, saving for retirement, effective management of your company's 401(k) plan, promoting financial wellness within your company, and more. **Held quarterly as posted.**

Sponsored & Led by The Fortis Group at Morgan Stanley.

Human Resources

Discuss HR hot topics from a family-owned business perspective. Appropriate for members who manage HR functions by default and HR professionals with training and experience. Learn from one another and share best practices. **Held quarterly as posted from 8:00-10:00 a.m.**

Sponsored & Led by Fishel Downey Albrecht Riepenhoff LLP.

Ignite Your Family BusinessSM

Hear first-hand from fellow family business owners on what they are doing to grow their business. Designed especially for CEO's, presidents and owners, gain the insights you need to ignite your business! **Held quarterly as posted.**

Led by GREENCREST.

Leadership Development

Explore relevant leadership challenges and opportunities. Learn new strategies, skills, and training to effectively manage your team. Engage in collaborative peer-to-peer discussions about work and leadership issues. **Held monthly on the third Tuesday from 8:00-9:30 a.m.**

Led by Jonathon McKay, PATH. Sponsored by Park National Bank.

Next Generation Leaders

Next generation family business members discuss issues specific to navigating greater leadership roles in the family business. An orientation for prospective members is offered each December. Monthly attendance is expected at this yearlong program. **Held monthly from Noon-1:00 p.m.**

Led by Thaddeus O'Brien, PhD, O'Brien & Associates.

Non-Family Leaders

Being a non-family leader in a family-owned business can be incredibly rewarding and challenging. Learn strategies of influence and impact for non-family leaders. **Held monthly on the fourth Thursday from 7:30-9:00 a.m.**

Led by Driscoll Learning.

Online Strategy

Learn the latest in Internet strategies such as SEO, inbound marketing, analytics, and web design. **Held biannually as posted.**

Led by Adept Marketing.

Succession Planning

From inter-family dynamics to strategic planning, explore the foundation for transitioning family business to the next generation. Not just for founders or owners, attending with your successors is important and beneficial. **Held monthly on the second Thursday from 7:30-9:00 a.m.**

Led by Bea Wolper, Emens & Wolper Law Firm, Thaddeus O'Brien, O'Brien & Associates, and Meredith Sugar, Taft/Law. Sponsored by The Fortis Group at Morgan Stanley.

Women in Family Business

For women who own, work for, or play a supporting role in a family business. Earning respect, leadership, employment practices, family dynamics, and communication are just a few of the topics that are explored in this interactive group. **Held monthly on the second Tuesday from 7:30-9:00 a.m.**

Led by Bea Wolper, Emens & Wolper Law Firm.



To join:

Please contact Event Manager Amy Dotts at ADotts@FamilyBusinessCenter.com.

Membership is required to participate. Peer Groups are open to all employees of a member company and are included in annual membership dues.



These Service Providers Understand What Central Ohio's Family Businesses Need



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Peter Reist, CPA/PFS, AIF
1.800.722.2289
ofgltd.com

WEALTH MANAGEMENT



Conway Center Service Providers understand the unique needs of family-owned businesses and share their knowledge with members during the Center's educational programs and peer groups. They are a resource for our members and are always willing to consult on issues from growing or transitioning your family business to valuations and marketing strategies.

Gold Level Service Providers commit significant funding resources to the Conway Center each year. We are grateful for their support of our non-profit and the services they provide our members.





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LOOK INSIDE FOR:
Photos from the Awards & Expo
Member Spotlights

IN THEIR OWN WORDS

Conway Member Testimonials



"The Conway Center gives an opportunity to see that the pressure that you feel as a family business has a commonality to it and it provides an opportunity - within appropriate limits - to talk about that amongst peers in family businesses. I think there's a lot of value there."

MARK CAIN
President, The Smoot Corporation



"I started attending Conway monthly meetings and peer groups several years ago. They have been instrumental to my development as a leader. I am thankful for a space to talk and learn from peers about issues we face as business owners and people in business. My husband and I both find value and we are thankful for this organization and community."

STEPHANIE CLAREY
President, TWO MEN AND A TRUCK®

MISSION OF THE CONWAY CENTER FOR FAMILY BUSINESS

- To help family businesses continue to be profitable and successful
- To assist family business owners with the transition of their business to the next generations
- To celebrate the accomplishments of outstanding family businesses within our community; and
- To increase awareness of the positive impact family businesses have on the Central Ohio economy