

THE SMITH FAMILY ENTERPRISE GAME PLAN



Our Ultimate Game Plan for Building
Generational Wealth, Leadership and
Legacy

Illustration Only

The Smith Family Enterprise Initiative

Dear Sam, Sally, Steve and Susan,

As we sit down to reflect on our journey, we are filled with gratitude for the life we have built together—not only as husband and wife but as business partners, parents, and now grandparents. When we first married at the age of 25, we took a leap of faith and purchased our first supermarket. We worked tirelessly to grow that single store into what is now Smith Family Foods, Inc., a thriving chain of 25 supermarkets across three states in the Midwest. More importantly, we built something that has kept our family close, giving all of you a foundation on which to learn, grow, and develop valuable skills.

Each of you has played a role in shaping the business, working in the stores as you grew up. Sam, you are now leading our incredible new Business Model developments as our Chief Business Innovation Officer. Sally, your passion for new ideas inspires us, and we are excited to see your growth as our Chief Technology Officer as you have worked hard to develop our e-commerce food business. Steve, while your aspirations lie outside the food industry, we admire your entrepreneurial spirit and are committed to helping you build a business of your own. Susan, though your path has led you to medicine, we are proud of the way you uphold our family values in your profession. And of course, our greatest joy is seeing our eight grandchildren growing up surrounded by the same values of hard work, integrity, and family that have guided us from the beginning.

We have always believed that our family's financial and business success should extend beyond just the food business. That is why we have thoughtfully invested in an Investment Portfolio and preserved our cherished Minnesota lake home—a place that holds so many wonderful memories for all of us. It is our hope that this home remains a gathering place for generations to come.

Looking ahead, we recognize that business, technology, and demographics are ever-changing. To ensure the long-term success of Smith Family Foods and our Family's financial security and personal well-being, as you know from our discussions, we are establishing The Smith Family Enterprise Initiative. This initiative will help us navigate the future with a clear plan for leadership, growth, and diversification, ensuring that our Family Businesses—and our Family's Values—endure for generations.

We are incredibly proud of each of you and excited for what the future holds. This is more than just a Family Business. This is our Family Legacy. Thank you for being part of this exciting journey with us.

Now ... let's get on it! Our first next step is to meet again with our Trusted Advisor Team. They will help guide us in setting our priorities and path.

With love and gratitude,

Dad

Bob Smith

Mom

Betty Smith

Our Family Enterprise Trusted Advisor Team

To help design, establish and deploy the Smith Family Enterprise Initiative we have looked to these Trusted Advisors to continue to guide us:

Nick Niemann
Family Enterprise Attorney
McGrath North Law Firm
1601 Dodge St., Suite 3700
Omaha, NE 68102
nniemann@mcgrathnorth.com

Peter Piper
Private Wealth Advisor
Piper Financial Advisors
123 Main Street
Main, USA
ppiper@PFA.com

Sally Seashell
CPA
Seashell CPA Firm
789 Sample Street
Sample, USA
sseashell@SCPA.com

Vision Statement

To always improve in a significant way the lives of all of those whose paths we cross.

Mission Statement

We cultivate enhanced success for our family, colleagues and community by investing in business excellence, leadership development, and multi-generational endurance.

Family Enterprise Council

Our Family Enterprise Council will oversee governance, succession planning, and strategic decision-making for The Smith Family Enterprise Initiative, ensuring alignment with family values, business continuity, and the long-term success of multi-generational Family Enterprise programs.

Company Board of Directors

Our Company Board of Directors will provide strategic oversight, governance, and accountability for Smith Family Foods Business, Inc., ensuring long-term success. It will balance family and business interests, guide leadership, uphold ethical standards, and support succession planning while fostering sustainable growth and protecting the Family Legacy.

Trusted Advisor Team

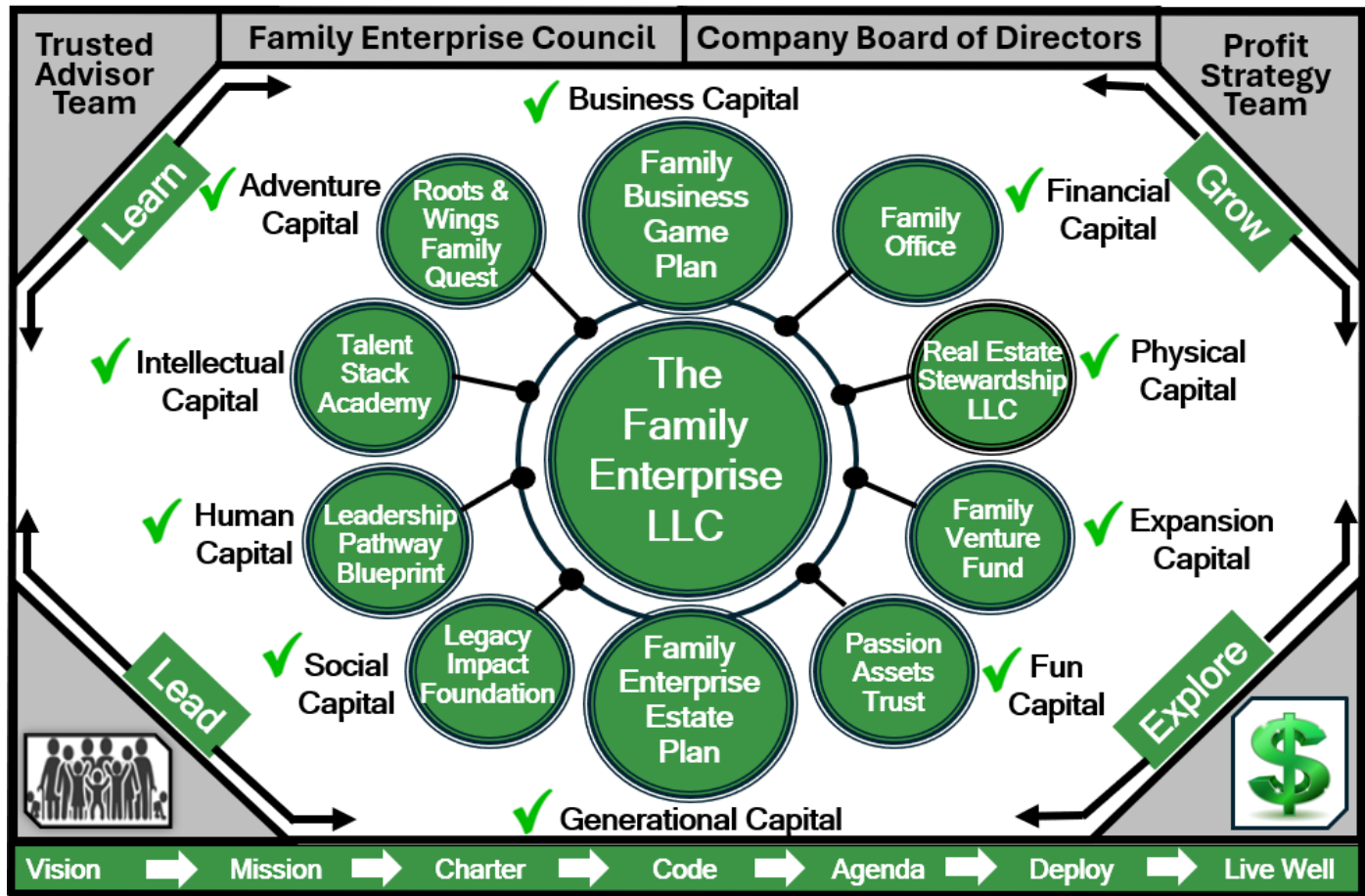
Our Trusted Advisor Team will provide experienced guidance on governance, financial stewardship, legal matters, and strategic planning, ensuring that The Smith Family Enterprise Initiative remains sustainable, aligned with family values, and positioned for long-term success.

The Smith Family Enterprise LLC

We have formed and funded The Smith Family Enterprise LLC to be prepared to deploy this Initiative.

The Smith Family Enterprise Game Plan

- Running the "Business of the Family" -



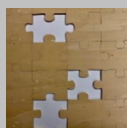
The Smith Family Enterprise Initiative Will Accomplish This:

- ✓ **Colleague Careers**
Great careers for our dedicated Family Business Colleagues.
- ✓ **Inspirational Legacy**
An outstanding Legacy built by our Family and Family Business Colleagues.
- ✓ **Leadership Team**
Excellent Leadership Teams which can successfully take on tomorrow's adventures.
- ✓ **Transition**
A successful internal transfer of the Family Business to those who can lead it forward to continued great success.
- ✓ **Incredible Culture**
An incredible Culture that attracts and retains our Colleagues and Customers.
- ✓ **Business Model**
Overcome Business Model disruptions with pivots to capture great new opportunities.
- ✓ **Communities**
Support our Communities in a big way with time, talent and resources.
- ✓ **Successful Pivot**
Always prepared for an external Company sale if that becomes the best future.
- ✓ **Family Careers**
Family Careers both inside and outside the Family Business based on talent and desires.
- ✓ **Dynamic Successor**
Develop great, dynamic Leaders and great, dynamic Successors.
- ✓ **Bloodline**
Family bloodline opportunities for our Family beyond the Family Business.
- ✓ **Peace & Security**
Peace of Mind. Family Peace. Family Financial Security. Multi-Generation Success.

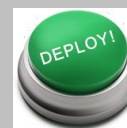
Our Family Enterprise Mindset: Always Be Asking 3 Key Questions



1. **Discover.** What will be the probable, almost certain, future outcome of our present course, if left unchanged?



2. **Decide.** What's missing - the presence of which will make a substantial difference in producing a better future outcome?



3. **Deploy.** What do we need to do next to move ahead with speed, clarity and focus to deploy what's missing?

From Running The Family Business ... To Running The Business of The Family

We Intend To Avoid These Trainwrecks:



How We Discovered the Family Enterprise Initiative

We want to share with our Family how this journey began—the journey we've named: **The Smith Family Enterprise Initiative**.

Running and growing the Smith Family Foods Business has been an incredible experience. But we've also wondered how to best prepare for the future—not just for the Family Business, but for the Family as a whole.

Like many Family Business Leaders, we've asked ourselves: What happens after us? What's the best way to protect what we've built while creating opportunities for all of you?

We didn't have a clear answer. But then something unexpected happened.

A Trusted Advisor Opens a Door

One of our most Trusted Advisors is our Private Wealth Advisor, **Peter Piper**. He has been working with us for years. He had recently attended a national business conference. While there, he heard a presentation by **Nick Niemann**, a Family Enterprise Attorney, who has worked with hundreds of Family Business Leaders across the United States. He works with Families to create **both** short term and long-term strategies for growth, leadership, and continuity.

Peter immediately saw the value of this with many of the Families he works with. Nick wasn't just talking about Business Succession, Exit or Estate Planning. He was also sharing a larger approach—and a larger vision. What he calls **The Family Enterprise Initiative**. This is an organized framework that enables Families like ours to grow our Family Business and to grow the Family Relationships, Values, and Purposes that give continued meaning to our Family and our Family Business.

Peter thought of us immediately. Peter reached out to Nick after the conference and discussed the Family Enterprise Initiative in more detail. He offered to Peter what he offers to all other Trusted Advisors. He offered the opportunity to have a no-obligation, no-cost introductory Zoom call with us, Peter and our other most Trusted Advisor, **Sally Seashell**, our CPA.

Our Zoom Call - The 3 Key Questions

Before the Zoom Call, with our permission, Peter and Sally provided Nick (on a confidential basis) a Personal Information and Financial Information Data Sheet and a Priorities Questionnaire (on the forms Nick provided).

Before the Zoom Call, Peter also provided us a copy of a Sample Family Enterprise Game Plan from Nick for us to review.

On our introductory Zoom Call we discussed the Family Enterprise Initiative. We also discussed our Family Business and whether we believed we are what Nick referred to as a Family Enterprise Family. This is a Family with imperfect parents and imperfect children (and spouses) who absolutely won't quit and who refuse to ever give up on each other. Towards the end of the call, Nick asked us 3 Key Questions - which would impact whether he would agree to work with us and which showed to us why these questions were key to our Family's future. These questions changed how we thought about our future.

Key Question #1—Discover	Key Question #2—Decide	Key Question #3—Deploy
"Were we willing to honestly discover the probable, almost certain, future outcome of our present course if left unchanged?"	"Were we willing to decide what was missing—the presence of which would make a substantial difference in producing a better future outcome?"	"Were we willing to do what we needed to do next to move ahead with speed, clarity, and focus to deploy what was missing?"
We Answered:	We Answered:	We Answered:
Yes. We realized that without a better structure, we could face the same challenges that cause many Family Businesses and Families to fragment over time.	Yes. We acknowledged that while we have strong values and hard work, we didn't yet have a formal plan to guide the Family forward.	Yes. Because we owe it to both us and to all of you—and to the next generation—to lead with purpose, not just hope.

The Next Step: Designing Our Family Enterprise Game Plan

Based on that conversation, Nick agreed to work with us and we decided to engage Nick, Peter and Sally to work with our Family to design what Nick calls a **Family Enterprise Game Plan**—a clear, actionable roadmap for continued success.

As Nick emphasized to us, this isn't about controlling anyone's path. It's about creating clarity, opportunity, and unity—for all of us now, tomorrow, and for generations to come.

Why We Are Mentioning This In Our Game Plan

We want our Family to know how intentional we've been about this process. This wasn't something imposed on us. It's something we chose because we love our Family and we care deeply about where we're headed. And because we had an "AHA Moment": We realized that what got us to this point would not be enough to carry us through the challenges and opportunities of the future.

No Profit Strategy. Our leadership team doesn't effectively deal with business innovation roadblocks.

No Pioneer Mindset. A "fear of change" mindset is overtaken by today's massive Business Model disruptions.

Declining Business Model. Our Business Model misfires, declines or fails.

Poor Company Culture. Poor Company culture deflates our team performance and customer loyalty.

No Strategic Thinking. External forces (competitors, insurgents, economy, technology, government) start to beat us.

Business Static. Business expansion opportunities start to be lost or ignored.

Business Not Protected. Business disputes and litigation losses deplete our business resources.

Ownership Not Protected. Company ownership is not correctly controlled or funded with the right buy-sell-hold options.

Continuity Not Protected. Avoidable co-owner disputes crush us.

Team Not Protected. Leadership team members leave to find better opportunities elsewhere.

Stability Not Protected. Company hits the skids if CEO/President is lost unexpectedly by illness, accident or death.

Wealth Not Protected. Personal risk exposures deplete our personal resources.

No Lifestyle Continuity. Inadequate Estate Plan controls damage our Company and deplete Family wealth.

Bloodline Failure. Bloodline wealth opportunities wasted.

Family Ownership Misallocated. Wrong Family members become Company owners or receive control.

Family Disputes. Business and estate disputes damage our Family.

Family Ownership Not Controlled. Wrong Family members remain Company owners or remain in control.

Estate Taxes. Estate tax hit.

Business Value Insufficient. Insufficient cash-in-pocket to meet our business and personal needs or objectives.

No Capable Successor. Wrong successor, no successor, or great successor leaves (to go help our competitor).

Not Always Ready. Company not always in prime condition to be operated, transferred or sold.

Income Taxes. Income tax hit.

No Viable Internal Transfer. No effective inside route succession or exit.

No Viable External Sale. No effective outside route exit.

The Smith Family Enterprise - Family Charter -

We, the Bob and Betty Smith Family, hereby establish and adopt the following Family Charter for The Smith Family Enterprise Initiative. Our purpose is to create enduring success for our Family and our Family Business Colleagues by solving and overcoming the following Challenges that destroy the well-being and success of too many other Families.

Family Challenges

- Lack of Prepared Successors
- Entitlement Mentality
- Poor Communication
- No Shared Vision or Purpose
- Disengagement or Apathy
- Sibling or Cousin Rivalry
- Unclear Roles Within the Family
- Generational Misunderstandings
- In-Law Conflicts or Ambiguity
- Lack of Identity or Purpose Outside the Business
- Neglect of Next Gen Education
- No Process for Family Conflict Resolution
- Unclear Family Wealth Philosophy
- Lack of Family Traditions or Family Events
- Fear of Discussing Mortality or Legacy

Family Business Challenges

- No Clear Succession Plan
- Founder or Key-Person Dependency
- Unprepared Next-Gen Leadership
- Mixing Family and Business Decisions
- Inadequate Governance Structures
- Inequitable Compensation Practices
- Dividend Disputes
- Unclear Employment Policies for Family
- Lack of Professional Development for Key Non-Family Employees
- Resistance to Business Model Innovation
- Overlooking Risk Management or Compliance
- Failure to Leverage Family Capital (Reputation, Network, Values)
- Neglecting Legacy or Lifestyle Assets (e.g., cabins, land, collectibles)
- Lack of Support for Entrepreneurial Family Ventures

Investment Challenges

- Lack of a Unified Family Investment Philosophy
- Overconcentration in the Operating Business
- No Diversification Strategy Post-Liquidity Event
- Failure to Engage a Professional Financial Advisor and CPA
- Investments That Conflict With Family Values

Succession/Exit Challenges

- No Formal Exit Strategy (for when and if)
- Unrealistic Valuation Expectations
- Failure to Prepare the Business for Internal or External Sale
- No Clear Role for Family Members Post-Exit
- Poor Tax and Estate Planning at Exit
- Lack of Buy-Sell Agreements or Stock Transfer Policies

The Smith Family Enterprise - Code Of Conduct -

Culture is the foundation of both our Family Business and our broader Family Enterprise. It shapes how we lead, collaborate, and make decisions that impact generations to come.

A strong Culture (based on honest and open communication and Family Alignment) ensures that our values endure, guiding us through challenges and opportunities alike.

Culture is what binds us together and sets the tone for our long-term success.

At the heart of our Family Enterprise are 7 Guiding Principles that define what we call our **Root Force Culture**:

- **Tenacity:** We embrace challenges with determination, resilience, and an unwavering commitment to our long-term vision.
- **Respect:** We honor each other's contributions, perspectives, and roles, fostering a Family and Business environment built on dignity and inclusion.
- **Trust:** We act with integrity and transparency, ensuring that trust remains the foundation of our relationships and decision-making.
- **Courage:** We take bold yet thoughtful actions, embracing change and innovation while staying true to our core values.
- **Generosity:** We share our success by giving back - supporting one another, our employees, and the communities we serve.
- **Compassion:** We lead with empathy, recognizing the importance of Family and Colleague bonds and the well-being of those around us.
- **Enthusiasm:** We bring passion and energy to our work, Family interactions, and shared experiences, inspiring each generation to contribute meaningfully.

These 7 Guiding Principles represent our **Code of Conduct**. These represent **how we think and how we act**.

By embedding these principles into everything we do, we create a Culture that strengthens our Family Business and our Family Enterprise, sustains our Legacy, and empowers our future generations to lead with confidence and integrity.

"Why do so many Families & Family Businesses fail?"

As Family Business Leaders we are aware of the 3 mindset bias traps, which Neuroscientists have named:

- **"Optimism Bias":** When we falsely believe our chance of experiencing a positive outcome is higher or a negative event is lower, than it actually is (i.e. "Bad things won't happen to me; these only happen to others").
- **"Confirmation Bias":** The tendency to search for, interpret and recall information in a way that supports what we already believe.
- **"Illusion of Control Bias":** The tendency to overestimate how much control we have over the outcome of uncontrollable events.

We are now very aware of these mindset bias traps. We will avoid these traps.

The Smith Family Enterprise - Governance Framework -

Trusted Advisor Team	Family Enterprise Council	Company Board of Directors		Profit Strategy Team
Members	Positions	Board	Officers	Members
<ul style="list-style-type: none"> • Private Advisor • CPA • Family Enterprise Attorney 	<ul style="list-style-type: none"> • Chair - Betty • Vice Chair - Bob • Legacy Impact Director - Susan • Talent & Leadership Director - Steve • Family Events Director - Sally • Finance Director - Sam 	Bob - Chair Betty - Vice Chair Sam Sally Steve Susan	Bob - CEO/Pres. Sam - Chief Business Innovation Officer Sally - Chief Technology Officer Ken - CFO Kara - CHRO	<ul style="list-style-type: none"> • Company Officers • 2 Front-Line Employees (TBD)
Meeting Dates				
<ul style="list-style-type: none"> • Attend All First Year Meetings 	Annual: January 31 Quarterly: April 30, July 31, October 31	Annual: January 31 Quarterly: April 30, July 31, October 31		<ul style="list-style-type: none"> • Monthly - First Monday

The Smith Family Enterprise Game Plan

- Running The "Business of the Family" -

Explanation

The Family Enterprise LLC

Our Family Enterprise Game Plan has been designed based on Family discussions amongst ourselves and with our Trusted Advisor Team. It is built upon 10 key components, each representing a distinct set of actions essential for enduring success. At its center is The Family Enterprise LLC—which contains our initial Funding for our Family Enterprise. This LLC is our Family Enterprise Operating Entity. This runs the "Business of the Family." Below is an explanation of each of the 10 key components. In the side panel are the Action Steps we will plan to accomplish in our First Year. We will reset the Agenda each year based on our goals and on input from our Family Enterprise Council, Company Board of Directors, Profit Strategy Team and Trusted Advisor Team.

Family Business Game Plan

At the core of our Family Enterprise is the Smith Family Foods Business, which serves as the foundation of our financial and operational success. We are committed to maintaining excellence, adapting to changing markets, and ensuring the business remains competitive and sustainable for future generations. Our Family Business is a vehicle for growth, opportunity, and shared purpose, reinforcing the values that guide our Family's economic pursuits.

Roots & Wings Family Quest

Shared experiences strengthen the bonds between Family members, creating a sense of unity and continuity across generations. Through the Roots & Wings Family Quest, we will embrace travel, exploration, business and cultural experiences that enrich our perspectives, encourage lifelong learning, and build lasting memories. These experiences will not only bring joy but also reinforce the Roots of our shared values and provide the Wings for us to soar to the future.

Talent Stack Academy

Education and skill development are essential for both individual and collective Family success. The Talent Stack Academy will provide opportunities for Family members to cultivate diverse skills, pursue higher education, and engage in continuous learning. This initiative ensures that each generation is well-equipped to contribute meaningfully to our Family Enterprise, whether within the main Family Business or through independent pursuits.

Leadership Pathway Blueprint

Strong leadership will be fundamental to the success of our Family Enterprise and our Family Business. We will prioritize leadership development by mentoring Family members and key employees, offering leadership training, and fostering an environment of accountability and responsibility. By developing capable and ethical leaders, we will ensure sustainability and growth of both our Family Enterprise and Family Business today, tomorrow and through successive generations.

Legacy Impact Foundation

A thriving Family Enterprise must be deeply rooted in the Communities it serves. We believe in giving back through philanthropic efforts, volunteerism, and active participation in social causes. Our commitment to social capital strengthens our relationships with stakeholders, enhances our reputation, and fulfills our responsibility to make a positive impact beyond our business interests.

1st Year Agenda

Action Steps

- ✓ Engage our Trusted Advisor Team.
- ✓ Create the LLC (with Operating Agreement Governing Framework).
- ✓ Establish our Family Enterprise Council.
- ✓ Fund LLC with \$TBD.
- ✓ Schedule Initial Family Enterprise Council Meeting.
- ✓ Develop Vision, Mission, Family Charter and Code of Conduct.

Action Steps

- ✓ Deploy our active Board of Directors and Profit Strategy Team.
- ✓ Adopt Codes of Business Conduct for our Owners, Directors and Colleagues.
- ✓ Develop a Strategic Growth Plan.
- ✓ Update Family Buy-Sell and Business Continuity Agreement.
- ✓ Adopt the Family Business Policy Package.

Action Steps

- ✓ Decide on and fund our First Annual Roots & Wings Family Quest.

Action Steps

- ✓ Design and fund our Grandchildren Talent Stack Trust.

Action Steps

- ✓ Develop a Leadership Pathway Blueprint.
- ✓ Bob will join a Vistage Chief Executive Board.
- ✓ Sam and Sally will each join a Vistage Key Executive or Advancing Leader Board.

Action Steps

- ✓ Bob and Betty will establish and provide an initial fund for The Smith Family Legacy Impact Foundation.
- ✓ Sam and Sally will become active in our State & Local Chambers of Commerce.

The Smith Family Enterprise Game Plan

- Running The "Business of the Family" -

Explanation

1st Year Agenda

Family Office

Financial Stewardship is key to ensuring the long-term prosperity of our Family Enterprise. We will uphold disciplined investment strategies, wealth management principles, and prudent financial planning to preserve and grow our present and multigenerational wealth.

Our financial strategies will emphasize diversification, responsible investing, and the alignment of our financial decisions with our Family Values.

Action Steps

- ☒ We will establish our Family Office, which will address the roles of our Private Wealth Advisor and CPA.
- ☒ We will adopt a Family Investment Policy.

Real Estate Stewardship LLC

Physical assets, such as real estate, will provide stability and long-term value for our Family Enterprise. We will strategically acquire, manage, and preserve real estate holdings that support our Family Business and personal financial security.

By maintaining a well-structured real estate portfolio, we will create generational wealth and provide tangible assets that contribute to the Family's long-term stability.

Action Steps

- ☒ Our Real Estate LLC is to be upgraded to better address Asset Protection objectives.
- ☒ The Real Estate Leases with Smith Family Foods will be upgraded to help establish market rates and terms.

Family Venture Fund

Entrepreneurship is encouraged within our Family to foster innovation and personal ambition. We will support Family members who seek to establish new ventures by providing start-up capital, mentorship, and business resources.

This initiative allows younger generations to explore their entrepreneurial potential while contributing to the overall economic strength of our Family Enterprise.

Action Steps

- ☒ We will establish a Family Business Incubator Fund within The Smith Family Enterprise LLC.
- ☒ We will establish a New Business Creation Policy to help assure that new business ideas are built around well-conceived Business Models.

Passion Assets Trust

Like many families, we have acquired and developed various assets that create recreation and joy for our Family. For many, this may be various kinds of collectibles.

For us, this has been our Minnesota Lake Cabin. Our Minnesota Lake Cabin is already being enjoyed by our third generation. We want to keep this in our Family for many years after Bob and Betty's deaths.

Action Steps

- ☒ Bob and Betty will create a Passion Assets Trust to own our Minnesota Lake Cabin and provide in our Estate Plan that sufficient funds are allocated to support this after our deaths for a time to be determined.

Family Enterprise Estate Plan

Ensuring the continuity of our Family Enterprise requires intentional Estate Planning. Our Estate Planning will be dedicated to not just transferring wealth at death, but also to Succession Planning, wealth transfer education, business continuity and instilling family values that sustain our Family Enterprise for future generations.

Through this thoughtful, intentional approach and long-term planning, we will ensure that our Family Enterprise thrives beyond our own lifetimes, securing a lasting Legacy.

Action Steps

- ☒ We will each add a Family Enterprise Addendum to our Estate Plans.
- ☒ We will each update our Family Life Insurance portfolio and positioning.
- ☒ We will each adopt the Personal Asset Protection Protocol.

FAMILY BUSINESS LEADERS

Results Not Wanted



Results Wanted



Results Achieved By

Your
Family Enterprise
Game Plan

Your
Family Business
Game Plan

What Is The Financial + Personal Cost of Being Too Late or Out of Time?

What Is The Financial + Personal Value of Each Great Play Deployed In Time?

Inspired By Excellence. Committed To Your Success.

When we work with Family Business Leaders, we ask about your story and the story of your Family Business. We get to see the heart and soul of America's Family entrepreneurs, that is, America's new breed of Family Business Pioneers.

We get to see your passion and your excellence. We get to see the grit and determination which drive you. We get to see the love and respect you have for your colleagues and for those you serve. In short, we get to see the pioneer spirit which drives you and your team. Just as it has driven me and our team.

For over 60 years we have been working with our nation's food companies, restaurants, farmers and ranchers to feed people better. We have been working with contractors and companies to build better and more affordable homes and new business facilities.

We have been working with technology companies to develop new ideas that improve lives. We have been working with inventors, startup companies and health care providers to develop patented medical devices, leadership teams and joint ventures that save lives. We have been working with energy companies to help fuel our homes and the businesses we all rely on.

We have been working with bankers, key partners, manufacturers,

distributors, retailers and transportation companies to finance, produce and deliver better products and services to communities around the world. We have been working with Family Business Pioneers and their other Trusted Advisors to transform, grow, carry on and transition the Family Business Dream, the backbone of our great country.

We have been working with our community leaders to improve our cities and our schools. We have been working with our elected leaders to improve the business climate to create and attract new and better jobs for Families.

For over 60 years, this has been the McGrath North Law Firm.

Working quietly behind the scenes closely with the talented leaders of great organizations around the world to make lives better.

Working together. Working stronger. Working faster. Working better. Overcoming Roadblocks. Avoiding Train Wrecks.

Inspired by Excellence. Committed to your Success.

Our diverse team isn't waiting for the future. We are helping to produce new, incredible, sustainable results right now.

We invite you to join us as we move quickly ahead towards the next 60 years.



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Membership Experience with:
Vistage International Family Business Network
Family Business Advisors Alliance

Family Firm Institute
CEO Space International
Business Enterprise Institute
Exit Planning Institute
Maxwell Leadership
Strategyzer AG
Secret Knock

Our Vision (Ultimate Goal)

That every Family and Family Business we serve will build a lasting Family Enterprise of generational wealth, leadership, and legacy.

Our Culture & Code of Conduct

- Tenacity—We never give up on Families.
- Respect—We honor both tradition and innovation.
- Trust—We earn and safeguard trust in every relationship.
- Enthusiasm—We bring energy and optimism to every challenge.
- Courage—We face difficult issues with clarity and resolve.
- Generosity—We offer our best ideas and efforts.
- Compassion—We remember that Family is always at the heart.

Our Mission (Why, What and How)

We "look into the future" with Family Business Leaders and your Trusted Advisors to discover, decide and deploy what's missing and still needed for you, your family, and your colleagues to achieve the full greatness of the Family Business Dream.

Our Mission Mindset

- "Begin with the end in mind."
- "Start with simple. Only add what's needed."
- "Go for great. Don't wait for perfect."
- "All plans are firm...until changed."

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