

# THE AMERICAS FAMILIES IN BUSINESS CONFERENCE

**Understanding the Modern Family with a 21<sup>st</sup> Century Business**

March 6 & 7, 2018

The Ritz-Carlton, Coconut Grove • Miami, FL, USA



The 11th annual forum for business-owning families  
from across North and Latin America



*Main Partners:*

**MACQUARIE CAPITAL LTD**

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*Organized by:*

**Campden Wealth**

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*This event is CPE certified:*



## Understanding the Modern Family with a 21st Century Business

It goes without saying that families are unpredictable. Business is manageable but with many moving parts. Technology is always developing and innovating at a rapid pace. And when you need it most, politics is sure to let you down. Where does this instability leave your family's business in its search for expansion?

Social factors like in-laws, marriage and divorce, new technologies, and changes to the political environment have made it tougher for families to just maintain the status quo without falling behind. Instead, they must innovate, cope and adapt with changing times. With that in mind, we have decided to dedicate the theme to this year's **Americas Families in Business Conference** to Understanding the Modern Family with a 21st Century Business.

Over two packed-days, you will hear from leading Latin and North American family business owners including Mars, L.L. Bean, JE Dunn Construction, Arduca, Couttenye & Co, Cementos Progreso, PET Caribe and many more.

As always, this conference will provide leading multi-generational family businesses the opportunity to network, benchmark best practices, and learn from thought-leaders in a private and congenial setting.

Each year, Campden Wealth brings together more than 100 members of families from around the world. Through a series of family-led interactive panel discussions, small group roundtables, and intimate, closed-door sessions, this prestigious conference is designed to be thought-provoking and to provide actionable insights to help families determine their future agendas.

### THE CAMPDEN WEALTH DIFFERENCE:

With a ratio of family to non-family participants higher than at any other family investment meeting, the resultant peer networking opportunities are widely acknowledged as being exceptional. Bringing together prominent family speakers, in-depth research and a wealth of industry experience, Campden Wealth has produced an unrivalled range of global conferences over the last two decades, packed with intuitive, informative and timely content.

The event will convene speakers representing leading family office principals, academics, family members, managers and advisors to share their knowledge and experience.

### 5 REASONS WHY YOU SHOULD ATTEND

- ① HEAR** from the best — ultra-high net worth families and individuals will be sharing what they know and how they've dealt with the challenges that come their way.
- ② ENGAGE** in interactive group work that will help map out future goals and direction for your own offices and families.
- ③ LEARN** from industry experts and passionate speakers who are doing incredible work globally.
- ④ Be EXPOSED** to new investment opportunities in both the closed-door sessions and panel discussions.
- ⑤ CONNECT** with leading families and key family office executives from all around the world — develop an impressive network in just one conference.

### 4 WAYS TO REGISTER:

1. Call Steven Sklar at: **(212) 204-2586**
2. Email Steven Sklar at: **stevensklar@campdenwealth.com**
3. Visit **www.campdenconferences.com/miami**
4. Fax back the enclosed registration form to **(212) 693-2797**

### INSTITUTE FOR PRIVATE INVESTORS (IPI) MEMBERSHIP

The Institute for Private Investors is the premier membership for ultra-affluent families, offering conflict-free wealth management education for sustaining and creating wealth — including portfolio management, investment strategies, family offices, advisor relationships, the next generation, governance and philanthropy — all within a safe harbor environment.

For over 25 years, the IPI community of 1,200 private investors has offered unrivaled regional, national and global networking and support to its members through peer-to-peer introductions, online investor conversations and proactive outreach from the IPI team. Membership includes the Campden Wealth events and research in addition to all of the IPI educational programs.

To apply or for more information, contact **Adam Wachter** at **aw@memberlink.net**, call **212-204-2584** or visit [instituteforprivateinvestors.com](http://instituteforprivateinvestors.com)

### CONFERENCE CHAIRWOMAN:

**LUCÍA ARTETA DURINI** • *Third Generation Family Member, Arduca, & Executive Director, FBN Ecuador* Ecuadorian, born 1969, married with 3 children. Third generation member of Arduca – an industrial and commercial group dedicated to wood veneer products. Since 2013, Lucía has been Executive Director of FBN Ecuador. At the moment, she is also a member of the Board of Directors of EDIMCA (commercial company of her family business), President of the Board of the American School of Quito, President of the Board of Medford S.A. a small company dedicated to summer camp operations.

### CONFIRMED SPEAKERS:

**LUCÍA ARTETA DURINI** • *Third Generation Family Member, Arduca, & Executive Director, FBN Ecuador*, Ecuador

**SHAWN GORMAN** • *Executive Chairman, L.L. Bean*, USA

**ALAN AIRTH** • *Fourth Generation Family Member & Director, Mars Inc.*, USA

**ERNIE PATTERSON** • *Director of Shareholder Relations, Brown-Forman Corporation Inc.*, USA

**MARSHALL LOCKTON** • *Senior Vice President, Operations, Lockton Companies*, USA

**LAUREN TRACY** • *Senior Business Development Manager, Dot Foods, Inc.*, USA

**TIMOTHY S. DUNN** • *Senior Vice President, Dunn Construction*, USA

**MICHAEL KANEFF** • *Third-Generation Chairman & CEO, Arkay Packaging*, USA

**DANIEL & MARGARET JAHN** • *Fourth Generation Family Members, Chicago Metallic Corporation*, USA

**PABLO AURE** • *Partner, Exaudi Family Business Consulting*, Venezuela

**RODOLFO PAIZ** • *CEO, 55 Fidelius Family Office*, Guatemala

**ALLEN BETTIS** • *President, Legacy Associates*, USA

**DARCY HOWE** • *Managing Director, KCRise Fund*, USA

**DR. JOSH BARON** • *Co-founder & Partner, Banyan Family Business Advisors*, USA

**ABIGAIL NOBLE** • *CEO, The Impact*, USA

**JAN GERBER** • *Co-Founder & Managing Director, Paracelsus Medical AG*, Switzerland

**ELENA COUTTENYE** • *President, Couttenye & Co.*, Venezuela/USA

**JAVIER ECHEVERRIA** • *CEO, FIF Echeverria Ampuero*, Ecuador

**JOSE MIGUEL TORREBIARTE** • *President, Cementos Progreso*, Guatemala

**ANDRE LOPEZ** • *CEO & Owner, PET Caribe*, Venezuela

**DANIEL GENTIL** • *Third Generation Family Member, Gentil Negocios*, Brazil

### FAMILY MEMBERS AND FAMILY OFFICE SPEAKERS:

**ALAN AIRTH** • *Fourth Generation Family Member & Director, Mars Inc.*, USA

Alan Airth currently serves as a director of Mars Inc., as well as the chairman of the Digital Committee, Board Advisor Search Committee and a member of the Audit and Benefits Committees. He built a successful commercial real estate and investment management business in Newport Beach, The Airth Company, and prior to that, he was a managing principal of The Koll Company. Invited by the Mars board and shareholders to serve as a corporate director, he has progressed rapidly as a contributing board member. Alan challenged the board to take an aggressive tack toward emerging digital disruption and transformation in its markets and industries. He was asked by the board chair to organize and launch a board Digital Committee (where Management sets the agenda, committee members provide insight and support, and advocate to the BOD on behalf of the business.) The result is that the Mars board is better prepared, more connected with new emerging digital innovations affecting the business, and more effective in planning a multi-year billion-dollar investment in the company's future.

**SHAWN GORMAN** • *Chairman, L.L. Bean*, USA

Mr. Shawn Gorman, great-grandson of company founder L.L. Bean, was appointed chairman of the board of L.L. Bean in May of 2013. Shawn's career at the company began in 1991, in the company's marketing department as an advertising analyst. He took on his first leadership role as assistant manager of marketing operations, and a year later was promoted to manager of international customer operations. From international, Shawn moved to L.L. Bean's newly-formed e-commerce division as manager of marketing and customer management. In 2002, Shawn joined partnership marketing, where he had responsibility for leading L.L. Bean's co-branded marketing programs. Shawn was named vice president of card services and direct to business (D2B) in 2008, overseeing the launch of D2B's first e-commerce site in the same year. Prior to becoming chairman of the board, Shawn served as senior vice president of brand communications, and is credited with integrating L.L. Bean's brand strategies across its mail, web, and retail channels to ensure consistency and customer focus. Shawn was born in Haverhill, Massachusetts, and grew up in Exeter, New Hampshire. He is a graduate of the University of New Hampshire, with a degree in English. Shawn has also completed executive programs at the Wharton School of Business and the Kellogg School of Management.

**MICHAEL KANEFF** • *Chairman & CEO, Arkay Packaging*, USA

Mitchell Kaneff, author of *Taking Over: Insider Tips from a Third-Generation CEO*, is the Chairman & CEO of Arkay Packaging, a 96-year old, family-owned and operated leader in the folding carton industry. Under Kaneff's direction, Arkay continues to be a market frontrunner in providing companies, such as Revlon/Elizabeth Arden, Estee Lauder, Procter & Gamble, and L'Oréal, with cutting-edge product packaging solutions. Kaneff's appreciation for customer satisfaction and his understanding of the industry has solidified partnerships with key customers, earning Arkay "Supplier of the Year" awards several years running. Kaneff, a graduate of Rochester Institute of Technology, began working at Arkay when he was still in high school, enabling him to expand and develop his expertise in print and management techniques while refining his entrepreneurial skills – an ability which has contributed powerfully to Arkay's growing success. In addition to locations in Hauppauge, New York and New York City, Arkay built a manufacturing facility in Roanoke, Virginia, 22 years ago and, in 2008, underwent an expansion to twice its size, a testament to leadership and the quality of the Arkay product. In addition to his role as CEO and author, Kaneff is involved with his band, The Young Presidents, writing and performing original rock music. The Young Presidents' latest album, *Live at Rockwood Music Hall* – which Kaneff also produced – is being released shortly. Their third album, *FIREHORSE*, was released in 2016. Mitchell Kaneff lives in New York City with his twin 17-year old sons, Max and Josh, and his wife, Amy.

For a complete list of speaker profiles or to register for the conference, please visit:

[www.campdenconferences.com/miami](http://www.campdenconferences.com/miami)

*Tuesday, March 6, 2018*

**CONFERENCE CHAIRWOMAN:**

**Lucía Arteta Durini, Third Generation Family Member, Arduca, & Executive Director, FBN Ecuador, Ecuador**

**8:00AM-8:40AM** Registration and Continental Breakfast

**8:40AM-8:45AM** **WELCOME FROM BRIEN BIONDI, PRESIDENT, IPI & CAMPDEN WEALTH NORTH AMERICA**

**8:45AM-9:00AM** **CONFERENCE CHAIRWOMAN'S OPENING REMARKS**

**9:00AM-10:00AM** **STAYING COMPETITIVE — METHODS TO GROW YOUR FAMILY BUSINESS**

With the fast-paced nature of the business cycle as well as the ambition of the next generation, access to capital is crucial to growing your business beyond your community. We are going to be focusing on the best ways to grow your business:

- Use of mergers and acquisitions in growing your business
- Understanding IPOs and the capital markets
- The benefits of private equity versus accessing the public markets
- Innovation and considering your changing customer and marketing

**Zonia Atencio, CEO, Grupo ZOOM, Venezuela**

**Jose Miguel Torrebiarte, President, Cementos Progreso, Guatemala**

**Daniel Gentil, Third Generation Family Member, Gentil Negocios, Brazil**

**Juan Pablo Martinez-Blat, Partner & Managing Director, OnNe Wealth & Enterprise Advisors, USA**

**10:00AM-10:45AM** **GROWING THROUGH A DOWNTURN — REGENERATING AND REINVENTING A FAMILY BUSINESS**

Family businesses have to keep innovating so they can deliver value and maximize returns to the shareholders and avoid being targeted by activist shareholders. We will look at how family businesses and their leaders continue to build upon the family's brand while developing a culture that fosters creativity and innovation.

**Mitchell Kaneff, Third-Generation Chairman & CEO, Arkay Packaging, USA**

**10:45AM-11:15AM** Networking Break & Refreshments

**11:15AM-12:00PM** **UNDERSTANDING AND COMBATTING GLOBAL THREATS**

Family businesses are confronted with a whole series of threats globally. With families being increasingly global, connected and vulnerable, these threats range from cyber and security to the impact of macro events to business reputation. The impact of these threats have magnified and can occur in real time. We will focus on techniques to combat these threats and provide peace of mind for family businesses.

**12:00PM-12:45PM** **FAMILY COMPANIES INVESTING IN THE INNOVATION ECONOMY — NEXT GENERATION LEADERS**

Adding innovative technology into traditional multi-generational businesses has never been easy. However, when the next generation of family business leaders have grown up with technology, there is an opportunity to innovate in a safe environment. We will be hearing from the next generation members of three Kansas City-based family businesses about how they are investing in technology and innovating their businesses.

**Eric Bradley, GM of News-Press TV / VP of Business Development, NPG Company, USA**

**Marshall Lockton, Senior Vice President, Operations, Lockton Companies, USA**

**Timothy S. Dunn, Senior Vice President, JE Dunn Construction, USA**

**Interviewed by: Darcy Howe, Managing Director, KCRise Fund, USA**

**12:45PM-2:00PM** Networking Lunch

**2:00PM-3:30PM** Working Groups — Each session will last for 90 minutes and delegates can choose to attend either working group.

**WORKING GROUP A: THE BENEFITS ENTREPRENEURS BRING TO FAMILY BUSINESSES (SPANISH)**

**Led by: Pablo Aure, Partner, Exaudi Family Business Consulting, Venezuela**

**Panelists include: Andre Lopez, CEO & Owner, PET Caribe, Venezuela**

**WORKING GROUP B: OWNERSHIP STRATEGIES (ENGLISH)**

*Led by: Dr Josh Baron, Co-founder & Partner, Banyan Family Business Advisors, USA*

*Panelists include: Loree Connors, Chief Financial Officer, Vitamix, USA*

*Daniel & Margaret Jahn, Fourth Generation Family Members, Chicago*

*Metallic Corporation, USA*

*Garner Robinson, CEO, Robinson Lumber Company, USA*

**3:25PM-3:55PM** Networking Break

**LEADERSHIP, ROLE MODELS AND THE IMPORTANCE OF GOOD GOVERNANCE**

Freeport-headquartered family business L.L. Bean was founded 106 years ago by entrepreneur Leon Leonwood Bean. Over the last century, it has successfully gone through three generational transitions and grown into a multi-billion-dollar corporation. Fourth generation family member and chairman, Shawn Gorman, will be providing unique ‘behind the scenes’ insight around the company’s and family’s governance structure.

*Shawn Gorman, Executive Chairman, L.L. Bean, USA*

**4:45PM-5:30PM** CREATING AND INVESTING IN INNOVATION

The rapid pace of technology innovation has shaken global industry and will continue to challenge all industries and their business models. Companies large and small, businesses old and new, must reconcile with this dynamic and uncertain landscape and choose to retreat, or try to press their advantage. Gordon Winston – an early entrant and visionary in IP royalty monetization, and Kelly Romano – former Vice president of business development at United Technology Corporation – will describe Xinova, the world’s leading external invention partner to C-suite offices. Xinova has built the world’s largest, most prolific inventor network, honed over a decade of work building over 400 invention portfolios as investments for Intellectual Ventures. Xinova is now independent, delivering its unique, demonstrated invention processes to technology-driven companies across the globe, and creating a new paradigm for investment in innovation.

*Gordon Winston, Managing Partner, Xinova Technology Reserve, USA*

*Kelly Romano, Managing Partner, Xinova Technology Reserve, USA*

**5:30PM-6:00PM** ‘OUR WAY’: LIVING A LIFE OF MEANING

During the final first day interview, third generation Bill Yoh will be discussing his book – *Our Life* – and providing insight into his family, his father’s career, and their family century-old multinational business Day & Zimmermann. We will also hear the details of the reserve takeover that started the billion-dollar enterprise.

*Bill Yoh, Executive & Third Generation Owner, Day & Zimmermann, USA*

**6:00PM-7:30PM** Cocktail Reception

**7:30PM** Sponsor-Hosted Private Dinners

*Wednesday, March 7, 2018*

**8:15AM-8:30AM** Registration and Continental Breakfast

**WELCOME FROM THE CHAIRWOMAN**

**8:45AM-9:35AM** MANAGING TRANSFORMATION AS A BUSINESS AND A FAMILY

Mars’ fourth generation family member, Alan Airth, will be sharing his thoughts on:

- Their approach to having a positive societal impact through, amongst other things, a comprehensive and acclaimed Sustainable in Generation Plan
- Mars’ evolving operating model for their company, that now has over 45% of its associates in veterinary care, while at the same time has 80% of revenues in confectionery, pet food and human food
- How they are embracing the challenges and opportunities of a digital age
- How they are evolving to the changing needs of their own family

*Alan Airth, Fourth Generation Family Member & Director, Mars Inc, USA*

*Interviewed by: Allen Bettis, President, Legacy Associates, USA*

**9:35AM-10:15AM** TAXES AND REGULATION

With families being more mobile and global, FACTA regulation and international tax law becomes an unavoidable reality. You will hear from experts on how to tackle the many regulatory hurdles.

## Wednesday, March 7, 2018 (cont.)

10:15-10:45AM

### **THE MODERN FAMILY: MODERN FAMILY MEMBERS AND THEIR IMPLICATIONS**

Modern life takes a heavy toll on the traditional definition of a family. Millennial children, with technology and second and third degrees, have increased career expectations. Additionally, adoptions, same-sex families, in-laws, divorces and second and third marriages each provide unique family business challenges. We will explore the social, emotional and financial impact of modern families, including:

- Millennials - education and expectation
- Social dynamics - women and in-laws
- Stress of modern life - mental health, drug and therapy

**Jan Gerber, Co-Founder & Managing Director, Paracelsus Medical AG, USA**

10:45AM-11:15AM

Networking Break & Refreshments

11:15AM-12:45PM

Working Groups — Each session will last for 90 minutes and delegates can choose to attend either working group.

### **WORKING GROUP A: FAMILY BUSINESS SUCCESSION – FROM START TO FINISH**

- Management transition
- Assets transition
- Values transition

**Herbert Steinberg, Board Member, Brasanitas, Ser Educacional & Companhia Industrial Cataguases, & President & Founder, Mesa Corporate Governance, Brazil**

### **WORKING GROUP B: BUILDING A SUSTAINABLE FAMILY BUSINESS (ENGLISH)**

**Abigail Noble, CEO, The Impact, USA**

12:45PM-2:00PM

Networking Lunch

2:00PM-2:30PM

### **THE MODERN FAMILY: HOW THE TRANSCONTINENTAL MODERN FAMILY IMPACTS FAMILY BUSINESSES**

- Citizens of the world
- Family members in different countries with different nationalities

2:30PM-3:15PM

### **PARTNERSHIPS & ENTREPRENEURS – GROWING PAST THE FIRST GENERATION**

**Elena Couttenye, President, Couttenye & Co., Venezuela/USA**

**Javier Echeverria, CEO, FIF Echeverria Ampuero, Ecuador**

*Moderated by: Dante De Lucia, Director, Competitive Legacy, LLC, USA*

3:15PM-4:00PM

### **THE BENEFIT DIGITALIZATION CAN BRING TO YOUR FAMILY BUSINESS**

The 20th century was famous for the internet and the 21st will be for digitalization and mobile connectivity. When the largest listed companies in the region today are Apple, Alphabet, Microsoft, Amazon and Facebook, this only further emphasizes the importance of connectivity and technology. Alibaba's Jack Ma famously spoke about how he can compete and beat Walmart in business. During this session we will be focusing on:

- Remotely running a family business
- Competing with the latest innovators and disruptors

4:00PM

Close of Conference

*Main Partners:*



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### FEEDBACK FROM PREVIOUS CONFERENCES:

*"Great job! Great agenda! Speakers and panels were right on point and helpful in furthering my own decision-making."*

**Family Business Owner, Columbia**

*"The conference was of very high quality and exceeded my expectations. Beyond the quality of the core presentations the co-chairmen and participating families presented themselves warmly and with authenticity and integrity."*

**Family Business Owner, United Kingdom**

*"A great opportunity to meet other family businesses and share experiences and discuss very interesting topics."*

**Family Business Owner, Venezuela**

*"I want to take this opportunity to tell you that I enjoyed the conference very much...it inspired me to continue getting involved in my family's business, for it has a lot of potential. All the moderators and speakers had something very special to share with the audience, and it was clear to see their passion for their own family businesses."*

**Family Business, Next Generation Family Member, USA**

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### FORTHCOMING U.S. CONFERENCES:

THE 6TH NORTH AMERICAN FAMILY INVESTMENT CONFERENCE  
JUNE 19 & 20, 2018 • CHICAGO IL, USA

THE NORTH AMERICAN FAMILY IMPACT INVESTING CONFERENCE  
SEPTEMBER 26 & 27, 2018 • SAN DIEGO CA, USA

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**This event is eligible for CPE credits.**



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17 STATE STREET, NEW YORK, NY 10004, USA  
TEL: +1 (212) 693-1300 OR TOLL FREE +1 (866) 902-3045