The Family Business Program

Growing Your Business, Protecting Your Future

Learn How To

- Increase Profits
- Manage Conflict & Stress
- Assure the Future of Your Business
- Sustain the Financial Prosperity of Your Family

A Unique, Hands-On Program Provided By:

ELLEN COOPERPERSON'S
CORPORATE PERFORMANCE CONSULTANTS

in partnership with


JOB LINE
YouTube

Why This Program?

More than 80% of businesses nationwide are family-owned, yet few consulting programs are specifically focused to meet the needs of family-owned businesses. We can help:

- Manage the needs of a business while coordinating the financial and emotional needs of multiple generations.
- Provide a more comprehensive plan for transitioning from business into retirement.
- Avoid the need to make critical decisions in the midst of crisis.

How Does The Program Work?

The Family Business Program draws on collective expertise of consultants who have many years of experience in the disciplines of business management, family counseling, mediation and financial and multi-generational planning. The strategic partnership offers a variety of tools and programs customized to meet the needs of individuals, small and medium-sized businesses.

What Are The Benefits?

- Increase profits by boosting productivity and contributions of family members/employees.
- Reduce stress caused by family conflicts related to running the business and/or managing the family's income, assets and financial legacy.
- Assure the future growth of the business while helping preserve family relationships across generations.
- Maximize assets earmarked for the next generation.

Business is business...Except

The Family Business Program will help resolve stressful and difficult management issues:

✓Bringing Family Members On-Board

- How do you feel about having your children in your business and ultimately taking over?
- How do you know if your children are ready? How can you gauge their qualifications for success?
- What is the best way for your children to learn how to be leaders?
- What if other family members want (or don't want) to join the business?
- What are the contractual, financial and ownership issues?

✓Managing Family Members as Employees

- How do you decide who will succeed you?
- How do you do what's best for the business while preserving harmony in the family?
- How do you handle the different financial needs of your children?
- How do you maintain the balance between professional management, responsible business ownership and harmonious family dynamics?
- If you need to remove a relative from your business, how do you handle it?

When It's a Family Business

The Family Business Program provides strategies to help manage complex transitions:

✓Creating a Family Business Action Plan

- How do you produce a written plan that coordinates powers of attorney financial and ownership agreements as well as various family trusts?
- How often should the family-business plan be reviewed and updated?
- What decisions need to be coordinated with members of non-family executives? What is the best way to handle that?
- How do you prepare for unexpected health or long-term care expenses that may affect the future of your business?
- How will a buyout be funded in preparation for retirement or in the event of the owner's disability or demise?

✓Preparing to Hand Over the Reins

- How will you assess the business and family readiness for your retirement?
- If you decide to transition the business to a non-family member, partner or employee, what ownership issues must be addressed?
- Is there a written business succession plan, including buy-sell agreements between you and your partners?
- Where will the funds come from to conclude a buyout?
- How do you best utilize corporate assets to provide personal benefits for family?
- How do you handle ownership and retirement concerns for family members of different ages?
- What financial provisions should there be for heirs who are not in the business?

~Who We Are~

Corporate Performance Consultants, Inc. has served Family-Owned Businesses since 1986 specializing in the areas of Organizational Development, Management & Communication Training, Executive Coaching, Family Mediation & Counseling, and assessing and selecting leadership talent. Along with ***Financial Forums, Inc.,*** we offer seminars, workshops and conferences for both professional and consumer audiences, designed to address multi-generational financial issues that affect every family member at various critical stages in their lives. We also offer consulting services for individual family businesses, helping people create "The Family Meeting" as a means of developing a collaborative approach to succession planning. We address financial and personal needs holistically--before they become a crisis--helping to relieve stress on family members, while providing options and strategies to meet the challenges facing them.

Ellen Cooperperson, President and Founder of Corporate Performance Consultants, is committed to empower and enable organizations to generate extraordinary business results. Ellen is a dynamic communicator who has led groups and coached high-level executives of multi-national organizations for more than 25 years. Growing up in a family business environment herself, she provided the foundation for her outstanding achievements with hundreds of family-owned businesses. Ellen has a unique ability to interpret and then simplify complex business issues and deliver innovative learning solutions that speed up alignment, understanding and the launch of new strategies. Among Ellen's numerous honors is being the recipient of the American Society for Training and Development awards for "Best in Training" and "Excellence in Organizational Transformation." Articles about Ellen have appeared in numerous local and national publications including The New York Times, Newsweek, Time, Newsday, Long Island Business News and the Wall Street Journal. She has appeared as a guest on CNBC, News12, WCBS News, WABC and numerous talk radio shows.

Dr. Charles L. (Chuck) Sodikoff, Senior Consultant with Corporate Performance Consultants, has specialized in training and developmental assessments for over 30 years. A licensed industrial and organizational psychologist, Chuck also brings a special expertise to managing family-owned businesses. In the 1980s, he founded his own practice, Family Business Consultants which later merged with CPC. In the 1990s, Chuck was a Senior Vice President with Drake Beam Morin, a leading human resources consulting firm. He has appeared on nationwide television and has been quoted in major popular magazines. Chuck has served on the Board of the Center for Family Research.

Henry Montag, Principal of Financial Forums, is a Independent Certified Financial Planner as well as a Certified Long Term Care specialist. Henry has been in practice since 1976. Over the years he has developed a wide expertise in understanding clients' goals and needs, coordinating them with their assets, as well as the variety of financial products available in the changing market. Henry has lectured extensively to organizations such as the New York State Bar Association and the New York State Society of CPAs. An advisor to the Center for Intergenerational Policy and Practice at Dowling College, he has also spoken to national organizations such as the American Association of Individual Investors and the Whitehouse Conference on Aging and the American Society on Aging. Henry has been quoted in numerous publications, including The Wall Street Journal, Investor's Business Daily and Newsday, and has appeared as a guest on Fox News, News 12 and many radio shows.

Ronald E. Roel, Principal of Financial Forums, is a veteran writer who specializes in aging, financial literacy and retirement planning issues. Over nearly 20 years, Ron held various positions at Newsday, including Special Writer on workplace issues, Deputy National Editor, Real Estate Editor, and Editor of the Act 2 Retirement section. Ron remains a regular contributor to Act 2, as well as a member of the Steering Committee Member of the Long Island Youth Summit at Dowling College, and an advisor to the Center for Intergenerational Policy and Practice at Dowling. He has been a frequent participant and speaker in regional conferences and workshops, including Vision Long Island; Gerontology Professionals of Long Island; and Nassau-Suffolk region of the New York State Public Health Association.

The Family Business Program

"Serving the unique needs of family-owned businesses."

The Family Business Program has individual programs and fees customized to meet the needs of small and medium-sized businesses.

For more information please contact:

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