



Institute for
Family Business

Invitation

Regional Forum Roundtable

October & November 2008

Family Business Succession

With the generous support of



Invitation

You are cordially invited to attend one of the IFB's 2008 series of Regional Forum Roundtables, which will focus on the issue of succession within the family business.

Each Roundtable will feature a keynote presentation, a live case study and a panel discussion to consolidate the learning. Our distinguished guest dinner speakers will share their views on philanthropy and CSR in the context of the family business and the overall objective of the Forum is to enable the owners of family firms to share knowledge, experiences and best practice.

The IFB is delighted to be embarking on a project, in association with Barclays Wealth, to produce a series of guide books which will accompany the Regional Forum Roundtable programme. Each delegate will receive a complimentary copy of **Family Business Management Perspectives: Succession** which will provide a source of information and guidance, encapsulating current expert thinking and best practice in family firms.

I do hope that you will be able to join us.

Grant Gordon

Director General, IFB

Institute for Family Business (UK)

The Institute for Family Business is an independent, not-for-profit membership association which supports the UK family-owned business sector through Advocacy, Education and Research. www.ifb.org.uk



Barclays Wealth

Barclays Wealth is the UK's largest wealth manager with total assets under management of £48.8 billion*. We serve clients in over 140 countries worldwide including the UK, providing international and private banking, investment management, financial planning, wealth structuring and brokerage. To help you grow your wealth, use and enjoy it, protect it and pass it on to future generations, we will act as your trusted adviser. www.barclayswealth.com
For further information please contact Sarah.Courtney@barclayswealth.com



*PAM (Private Asset Managers) 2008.

Programme Schedule

- 15:30** **Registration / Tea & Coffee**
- 16:00** **Keynote Presentation**
Theme: Succession
Penny Webb 08 October & 19 November
Barbara Murray 15 October & 26 November
Howard Hackney 12 November
- 16:30** **Live Family Business Case Study**
Bedfordia Group 08 October
John Good Shipping 15 October
Seddon Group 12 November
Strutt & Parker (Farms) 19 November
A Proctor Group 26 November
- 17:15** **Tea & Coffee**
- 17:30** **Q & A / Roundtable & Panel Discussion**
- 19:00** **Family Business Dinner**
Guest Speakers:
David Samworth 08 October
President, Samworth Brothers
Jonathan Wild 15 October
Chairman, Bettys & Taylors of Harrogate
Sir Michael Bibby 12 November
Managing Director, Bibby Line Group
Zameer Choudrey 19 November
Group Chief Executive, Bestway
David Macdonald 26 November
Former Chairman & Managing Director, Glenmorangie
- 21:00** **Close of meeting**

The Participants

Keynote Speakers:



Penny Webb, Familias & Co

08 October (Leicestershire) / 19 November (London)

CEO of Familias & Co, Penny is a seasoned executive coach and business advisor whose research is focused on the role of mentoring in the family firm and conflict resolution.

Penny founded Whitehead Mann's Centre for Family Business Excellence and chairs the IFB's Advisory Council.



Barbara Murray, Family Business Solutions

15 October (Harrogate) / 26 November (Scotland)

Dr. Barbara Murray is a consultant, teacher, and writer on family business matters. Her approach centres on ensuring a professional system of governance to harness and focus the family's passion and creativity. Barbara is a founder of the UK's first Centre for Family Enterprise and co-founder of Family Business Solutions Ltd.



Howard Hackney, Grant Thornton

12 November (Knutsford, Manchester)

Howard has been a partner in Grant Thornton UK LLP for over 20 years and is based in Liverpool and the North West of England. He has worked in the London office and set up the Warrington office and in 2002 won the CBI's Best Business Adviser Award. His typical clients are mid market privately owned businesses and he has a particular specialism in dealing with and resolving the natural tensions that arise in any family owned business.

Case Studies

Bedfordia Group

Midland Forum, 08 October 2008

Based in Bedfordshire, Bedfordia has been trading since the early 1930's and today operates across four market sectors: agriculture (arable, grain and livestock), automotive (retailing and after-sales), eco-technology (renewable energy production and waste recycling) and property (development, investment and management).



John Good Shipping

Yorks & North East Forum, 15 October 2008

This year celebrating 175 years, John Good Shipping is one of the largest independent ship agency companies in the UK today. Its principal areas of activity are liner agency, port agency, freight forwarding, haulage and warehousing.



Seddon Group

North West Forum, 12 November 2008

Operating throughout the UK, Seddon Group has over 110 years of experience in regeneration, development, construction and maintenance. Seddon Group has evolved into a modern, fully-integrated group of specialist companies which is at the leading edge of the UK's construction industry.



Strutt & Parker (Farms)

South East Forum, 19 November 2008

Strutt and Parker (Farms) Ltd. is a fifth generation farming and landowning company with various other interests. It owns 12,400 acres and rents or contracts a further 6,800 in Essex, Suffolk and Huntingdon, and has diversified into industrial units, holiday cottages, livery yards and office accommodation.



A Proctor Group

Scotland Forum, 26 November 2008

Based in Blairgowrie, Perthshire, the company's history stretches back to the 1800's when flax spinning and textiles were two of Tayside's major industries. Following diversification in the 1950's, the company is now one of the UK's leading suppliers of a wide variety of innovative products and systems for the construction industry.



The Venues



Midlands Forum – 08 October 2008, Leicestershire

Chairman: Nick Linney, W & J Linney Ltd

Kilworth House Hotel, Lutterworth Road, North Kilworth,
Leicestershire, LE17 6JE. Tel: 01858 880058

www.kilworthhouse.co.uk



Yorks & North East Forum – 15 October 2008, Harrogate

Chairman: Christopher Oughtred, William Jackson & Son Ltd

Rudding Park, Follifoot, Harrogate,
North Yorkshire, HG3 1JH. Tel: 01423 871 350

www.ruddingpark.com



North West Forum – 12 November 2008, Knutsford, Manchester

Chairman: Mike Roberts, Frank Roberts & Sons Ltd

Booths Hall, Booths Park, Chelford Road, Knutsford,
Cheshire, WA16 8QZ. Tel: 01565 752882

www.boothspark.co.uk



South East Forum – 19 November 2008, London

Chairman: Nicholas Reed, William Reed Business Media

Hyatt Regency London – The Churchill, 30 Portman Square,
London, W1H 7BH. Tel: 020 7468 5800

www.london.churchill.hyatt.com/hyatt/hotels/index.jsp



Scotland Forum – 26 November 2008, Edinburgh

Chairman: George Stevenson, Mathiesons Bakeries Ltd

The Balmoral, 1 Princes Street,
Edinburgh, EH2 2EQ. Tel: 0131 556 2414

www.thebalmoralhotel.com

IFB Regional Forum Roundtable 2008

Please return completed forms to the Institute for Family Business (UK),
32 Buckingham Palace Road, London, SW1W 0RE or fax to 020 7630 6251.
Please note these meetings are free of charge.

Family Name	Title
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First Name	
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Position	
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Organisation	
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Additional Delegate

Family Name	Title
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Position	
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Data Protection: All information given will be held in the strictest confidence. Information will not be released to third parties without your express permission.

I/We wish to attend the following Regional Forum Roundtable (please tick one box):

- Midlands Forum: 08 October 2008, Leicestershire
- Yorks & North East Forum: 15 October 2008, Harrogate
- North West Forum: 12 November 2008, Knutsford, Manchester
- South East Forum: 19 November 2008, London
- Scotland Forum: 26 November 2008, Edinburgh

Do you have any dietary requirements? Yes

Please give details

- I/We wish to receive information about the
Institute for Family Business (UK)

Cancellation Policy: As these meetings are complimentary, the IFB requests that you notify us at least two weeks prior to the meeting for which you have registered.

Growing successful enterprises
for generations to come

Institute for Family Business

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