



Institute for  
Family Business

## Invitation

### Regional Forum Roundtable

October & November 2009

### Family Business Ownership

How to be an effective and responsible  
steward during challenging times

With the generous support of



# Invitation

You and your family are cordially invited to attend one of the 2009 Regional Forum Roundtables, which will focus on Family Business Ownership.

The programme will look at how family businesses can achieve a **proactive, effective** and **responsible** approach to **ownership**, especially when the company may be facing challenging circumstances, and shareholders are seeking reassurance.

Topics to be explored include:

- **Managing in the recession** – driving strategies that are consistent with the family's values and balancing the need for short term results with the firm's long-term vision
- **Fostering stewardship** – encouraging owners to be engaged and supportive
- **Maintaining cohesive ownership** – providing liquidity and exit opportunities for shareholders
- **Creating opportunities for succession** – preparing the next generation to become responsible owners

The overall objective of the Regional Forum Roundtable programme is to enable owners of family firms to share knowledge, experience and best practice. I do hope that you and your family will be able join us in one of the regions.

## Grant Gordon

Director General

## Institute for Family Business (UK)

The IFB 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](http://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 high net worth clients worldwide, providing international and private banking, investment management, fiduciary services and brokerage. To help grow your wealth, use and enjoy it, protect it and pass it on to future generations, we will act as your trusted advisor. [www.barclayswealth.com](http://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: Family Business Ownership**  
**Dr Albert Jan Thomassen** 07 October  
**Penny Webb** 14 October  
**Ken McCracken** 11 November  
**Denise Kenyon-Rouvinez** 18 November
- 16:40**      **Live Family Business Case Study**  
**East End Foods plc** 07 October  
**Town Centre Securities plc** 14 October  
**Edward Billington & Son Ltd** 11 November  
**Day Lewis plc** 18 November
- 17:15**      **Tea & Coffee**
- 17:30**      **Group discussions and feedback on family business ownership debate**
- 19:00**      **Family Business Dinner**  
**Guest Speakers:**  
**Chris Kelly** 07 October  
Chairman & Managing Director, Keltruck Ltd  
**Nimble Thompson** 14 October  
Chairman, NG Bailey Ltd  
**Mark Duerr** 11 November  
Managing Director, F. Duerr & Sons Ltd  
**Martin George** 18 November  
Chairman, Whithworths Holdings Ltd
- 21:00**      **Close of Forum**

# The Participants

## Keynote Speakers:



### **Dr Albert Jan Thomassen**

07 October (Birmingham)

Albert Jan Thomassen is an educator and consultant on ownership, governance and succession topics for family owned businesses. As an associate of the Family Business Consulting Group, he regularly works with business owning families in Europe, Asia and South America. He is on the faculty of TiasNimbas Business School and executive director of FBNeD (FBN Netherlands).



### **Penny Webb**

14 October (Harrogate)

Penny Webb is founder of Familias & Company, a specialist international consulting firm dedicated to Developing Leaders and Building Relationships. She is a senior associate of the Family Business Consulting Group and is a regular speaker, writer and practitioner for family businesses worldwide. Penny is Chairman of the IFB Advisory Board.



### **Ken McCracken**

11 November (Manchester)

Ken is a consultant with Family Business Solutions Limited, the UK's largest family business and family office consulting group. His work is mainly in family enterprise continuity planning and governance. He is a member of the Family Firm Institute and a member of the Advisory Board of Family Business Wiki.



### **Denise Kenyon-Rouvinez**

18 November (London)

A Swiss-American expert in the field of family business, Denise is a senior associate of the Family Business Consulting Group. She is the author and co-author of several books on family business issues and has received several awards for her research. She is also an accredited Lifo® Licensee.

## Case Studies

### East End Foods plc

**Midlands Forum, 07 October 2009**

East End Foods was established in the late 1960's by the Wouhra brothers. Now the largest importer of ethnic food products in the UK, the company also has two wholesale Cash & Carry's in Birmingham. The family recently acquired the HP Foods factory site in Birmingham which will be developed into a Cash & Carry, Hotel and Conference Centre.



### Town Centre Securities plc

**Yorks & North East Forum, 14 October 2009**

Town Centre Securities plc (TCS) is a leading UK property investment and development company with assets in the region of £300 million. With more than 50 years' experience, a commitment to sustainable development and a reputation for quality and innovation, TCS create outstanding mixed use developments close to transport hubs in major cities across the UK.



### Edward Billington & Son Ltd

**North West Forum, 11 November 2009**

Founded in 1858, Edward Billington & Son Ltd. is a growing family of trading and manufacturing businesses, with a breadth of products and services in the food and agriculture sectors. It is one of the UK's largest privately-owned companies, with a rich tradition of enterprise and entrepreneurship.



### Day Lewis plc

**South East Forum, 18 November 2009**

Headquartered in Croydon, Day Lewis plc now comprises over 160 chemist branches, making it the UK's largest independent chain of pharmacies. The company is involved in retail and wholesale pharmaceuticals and also supplies medical equipment offshore to oil rigs and shipping companies.



## The Venues



### **Midlands Forum – 07 October 2009, Birmingham**

**Chairman:** Nick Linney, W & J Linney Ltd

Malmaison Birmingham, The Mailbox,  
1 Wharfside Street, Birmingham B1 1RD

Tel: 0121 246 5030

**[www.malmaison-birmingham.com](http://www.malmaison-birmingham.com)**



### **Yorks & North East Forum – 14 October 2009, Harrogate**

**Chairman:** Christopher Oughtred, William Jackson & Son Ltd

Rudding Park, Follifoot, Harrogate,

North Yorkshire HG3 1JH

Tel: 01423 871 350

**[www.ruddingpark.com](http://www.ruddingpark.com)**



### **North West Forum – 11 November 2009, Manchester**

**Chairman:** Mike Roberts, Frank Roberts & Sons Ltd

Malmaison Manchester, 1-3 Piccadilly,

Manchester M1 1LZ

Tel: 0161 278 1000

**[www.malmaison-manchester.com](http://www.malmaison-manchester.com)**



### **South East Forum – 18 November 2009, London**

**Chairman:** Nicholas Reed, William Reed Business Media Ltd

The Bentley London – The Waldorf Astoria Collection,

27-33 Harrington Gardens, London SW7 4JX

Tel: 020 7244 5378

**[www.thebentley-hotel.com](http://www.thebentley-hotel.com)**

## IFB Regional Forum Roundtable 2009 Registration Form

Please complete and return this form 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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Address	
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Postcode	
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Email	
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**Additional delegate(s)** – please use a separate sheet if necessary

Family Name	Title
<hr/>	
First Name	
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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: 07 October 2009, Birmingham
- Yorks & North East Forum: 14 October 2009, Harrogate
- North West Forum: 11 November 2009, Manchester
- South East Forum: 18 November 2009, London

Do you have any dietary requirements?  Yes

Please give details

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**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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