

FECC 2017

Family Enterprise Case Competition

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Grossman School of Business
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JUDGES
PROFILE BOOKLET



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JUDGE ORIENTATION LEADERS



FRANK HOY

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"Frank Hoy is the Paul R. Beswick Professor of Entrepreneurship and Director of the Collaborative for Entrepreneurship and Innovation at Worcester Polytechnic Institute. Dr. Hoy earned his Ph.D. at Texas A&M University where he developed a small business outreach program for the Texas Agricultural Extension Service. Subsequently, he became director of the Small Business Development Center for the State of Georgia. He moved from the University of Georgia to Georgia State University in 1988 as the Carl R. Zwerner Professor of Family-Owned Businesses. From 1991 to 2001 Dr. Hoy was Dean of the College of Business Administration and from 2001 to 2009 director of the entrepreneurship centers at the University of Texas at El Paso. His most recent books are Entrepreneurial Family Firms (with Pramodita Sharma, 2010), Small Business Management: Launching and Growing Entrepreneurial Ventures (18th ed. with William Petty and Leslie Palich, 2017), and The Routledge Companion to Family Business (with Franz W. Kellermanns, 2017)."



MATTIAS NORDQVIST

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"Mattias Nordqvist is Professor and the Hamrin International Professor of Family Business at Jönköping International Business School in Sweden where he also serves as the Director of Center for Family Enterprise and Ownership. He is a former Co-Director of the Global STEP Project and Visiting Scholar at Babson College. He is an active educator and advisor to several international and national business families."

COMPETITION JUDGES



RIZ AHMAD

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Henley Business School
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"Riz is a management consultant advising financial institutions on credit, risk, and capital strategy and is concurrently in a part-time Doctor of Business Administration program at Henley Business School, University of Reading with supervision at University of Toronto's Rotman School of Management, researching family businesses and the question of emotional value. He has broad experience in banking and corporate finance with major financial institutions in London, New York, and Toronto. Riz has a BA Honours from Sussex University and an MPhil from Cambridge University, both in International Relations, and an MBA from Ivey Business School, Western University in Canada. He lives in Toronto and has guest lectured to graduate business students at several business schools."



STEFAN BACHOFEN

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Country Business Inc.
USA

"Stefan is a Business Valuator and Broker with CBI, New England's largest business brokerage firm. Previously, Stefan spent four years as General Manager of Vermont's largest specialty food and wine retailer – a family business – where he introduced an e-commerce website and social media strategy, and directed all operations, marketing, and human resources activities. Prior to his General Management role, Stefan spent several years as a Hotel Assistant Manager at Four Seasons Hotels and Resorts in Miami. Additionally, Stefan spent one year as an Educator in Istanbul, Turkey, teaching English to professionals and corporations. He was raised in a family-owned bed and breakfast in Southern Vermont, and began learning the business when he was tall enough to serve guests coffee. Stefan is a Certified Valuation Analyst (CVA), holds a Real Estate Sales License in Vermont, and received his MBA from the Copenhagen Business School."



MARC-MICHAEL BERGFELD

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"Prof. Dr. Marc-Michael "Micha" Bergfeld is Professor of Global Family Business at Munich Business School (inc. the Academic Director of the Exec. MBA Program) and heads Courage Partners Group, an international advisory and execution boutique for large business families and their long-term prosperity. At Munich Business School he educates and mentors Next Generation leaders from Europe, Asia and Latin America. At Courage, the team and Prof. Dr. Bergfeld advise large business families (in terms of family and / or asset size) on long-term strategy & succession, portfolio control & family office performance, and Next Gen entrepreneurship & venture investments. Courage assists the business families to "cross-over" from one generation to the next, from old business models to the digital world, and from their home turf to international markets. Total assets advised: > 10 BN USD, > 60.000 employees."



DEBBIE BING

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"Debbie Bing is a Principal at CFAR. Originally a research center within the Wharton School of the University of Pennsylvania, CFAR was spun off as a private management consulting firm 27 years ago and serves clients worldwide from offices in Boston and Philadelphia. Debbie's specialty is helping family businesses create leadership, strategic, and continuity plans that bridge the interests of family, business and its owners, across generations. Debbie works with senior and next generation family members to design governance structures and forums that engage family members and are guided by shared goals for the entire family enterprise. Her methodology brings all appropriate players into the process of generating options, making decisions, and committing to a plan so that they "own" the solution. In October 2014, Debbie was honored as a Fellow of the Family Firm Institute, from which she earned both the GEN and Advanced Certificates in Family Business Advising. She is a member of the FFI board and an adjunct faculty member at D'AmoreMcKim School of Business at Northeastern University. Debbie holds a Bachelor of Arts from Haverford College and a Master's of International Law and Diplomacy from the Fletcher School at Tufts University."



LEE BOUYEA

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"Bouyea is a Managing Director at FreshTracks Capital, an early stage venture capital firm focused on investing in Vermont businesses. He currently serves on the Boards of Patient Engagement Systems, Bridj, Social Sentinel & Ello, and is an Observer to the Mamava and Horse Network Boards. Lee also leads FreshTracks' investments in Iris-VR, and formerly served on the Boards of mophie (acq. by mStation), Kluster (acq. by Quirky) and NEHP (acq. by Critical Process Systems Group). Bouyea's professional background includes marketing, product and business development expertise working for eBay, Nextel Communications and Pacific Marketing Associates. Lee was also an early employee at the venture-backed startup Ebates, which was acquired by Tokyo-based Rakuten for \$1Bn in 2014. He is a native of Burlington, VT where his family owned and operated Bouyea-Fassetts Bakery for three generations. Bouyea-Fassetts successfully sold its assets to the Freihofer Baking Co. in 1989."



DAVID BRAHAM

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"David Braham is currently the Regional Manager (North America) for Campden Wealth - the leading independent provider of knowledge, education and intelligence for multi-generational business-owning and financial families. In his role, he is responsible for producing Campden Wealth's four US conferences as well as contributing to the quarterly magazines and research. During his time at Campden Wealth, David has worked with family business owners and experts across four continents. Prior to joining Campden Wealth in 2014, David was the Emerging Markets Director for the Global Real Estate Institute, based in London. This followed an eight-year career in international relations in the UK and USA."



IRA BRYCK

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Family Business Center of Pioneer Valley
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"Ira Bryck is president of the Family Business Center of Pioneer Valley (in Western Mass). The center provides a learning community for family and closely held companies, which include dinner forums, confidential roundtables, and varied workshops; and produces the website fambizpv.com and advice column, Dear Ira: Fresh Air and Cold Water for the Perplexed Business Family. Ira confers with entrepreneurial families on an array of usual and unusual challenges. He is the author of three plays about life in family business, including A Tough Nut to Crack, based on his 17 years in his family's 4th generation childrenswear business on Long Island, where he served simultaneously in every role from president to tailor. The plays have been performed internationally over 100 times. Ira hosts The Western Mass Business Show on WHMP in Northampton Mass, where he interviews business owners and expert advisors about what inspires them, keeps them awake, helps them succeed, and makes them unique."



BRIDGET BURKHARDT

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Burkhardt Family
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"Bridget Burkhardt has spent her career in finance, both mainstream and double-bottom-line. Burkhardt received a B.A. from Brown University in 1995 and an M.B.A. from Harvard Business School in 2000. She spent her early professional years working in investment banking and private equity in New York City. After moving to London in 2001, she worked for a community development venture capital fund that builds businesses in economically deprived areas of England. After returning to the US in 2004, she became a Vice President for SB Partners, a venture capital firm that invested in women- and minority-owned businesses. In 2006 she joined ShoreBank International (now called Enclude), a consulting firm that works with microfinance institutions, small business banks and affordable housing lenders in developing countries. As a Senior Consultant, she specialized in structuring financial instruments to help ShoreBank's clients raise funds from both public and private sources to fulfill their mission."



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"Fritz Burkhardt is an Associate Professor of Finance at Champlain College. He has taught classes at Northwestern University, University of Notre Dame and Champlain College. He previously worked as a research analyst covering Eastern Europe and the former Soviet Union for Bank Austria Creditanstalt and as an investment banker in mergers and acquisitions for Merrill Lynch. He sits on the Boards of CFA Society Vermont and the Vermont Educational & Health Buildings Financing Agency. Fritz holds a PhD in Finance from Northwestern University, an MBA with High Honors from the University of Chicago's Booth School of Business, and a BA from Middlebury College in Economics and Russian and Eastern European Studies with Honors."



REBECCA CHUNG

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China Europe International Business School
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"Rebecca focuses on developing knowledge on growth strategies for multinational enterprises, especially family firms in China. She has conducted applied research for leading business schools such as IMD (Switzerland), and family business research institutes such as Cambridge Institute for Family Enterprise (USA) and CEIBS Center for Family Heritage (China). Rebecca has disseminated cutting-edge knowledge through publication of teaching cases, managerial articles and book chapters, including a leadership article "The China Question" and a case study "Change at Michelin Shanghai Factory" on Financial Times. Rebecca won the EFMD case writing competition several times and the EURAM Imagination Lab Award for Innovative Scholarship. The Case Center featured her pedagogical approach in their newsletter and magazine a few times. Rebecca also presents her ideas at international business and academic conferences, such as the INSEAD Family Enterprise Day and the Family Business Conference organized by Indian School of Business."



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"Mita Dixit heads Research & Consultancy division at the Center for family managed business (CFMB) of SPJIMR, one of the top ranking management institutes in India. An associate professor, a management consultant, and an entrepreneur, Mita has over two decades of experience in family-business advisory, strategic marketing, market research, and organizational development. She deeply understands the dynamics of family businesses as she has worked in her family's business as well as has guided about sixty family firms on growth, governance, and succession planning. At CFMB, Mita leads the initiative of developing advanced management programs for business families, conducting research on contemporary issues of family business, and advising owners, promoters on strategic growth for generational continuity. She is a faculty in the post graduate program for family managed business, India's first modular MBA program for next generation scions of family businesses."



JOSIANE FAHED-SREIH

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"Dr. Josiane Fahed-Sreih is a full time Associate Professor of Management in the School of Business at the Lebanese American University. She is the founder and currently the Director of the Institute of Family and Entrepreneurial Business at the Lebanese American University. She is currently the Chairperson of the departments of Hospitality Management and Marketing at the Lebanese American University. She holds a Ph-D from the Sorbonne University and is a fellow member of the Family Firm Institute, USA. She holds the responsibility of the Middle East Coordinator for the Family Firm Institute, USA. She is a Family Wealth and a Family Business Consultant. She is the winner of the 2007 International Award on family Business from the Family Firm Institute in the US, in recognition for outstanding achievement in furthering the understanding of family business issues that occur between two or more countries. She participated and organized international conferences, workshops and seminars. She has presented in major conferences locally and internationally and consulted on management issues in many countries and specially the Middle East: Saudi Arabia, Dubai, Jordan, Kuwait, Syria, Qatar, Bahrain, Cyprus, France and Lebanon. She currently sits on five boards of directors as a shareholder, one as a Chairman of the board, and one as an independent advisor in the private sector; she is also involved as an advisor on boards of community service organizations."



HANQING (CHEVY) FANG

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Missouri University of Science and Technology
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"Dr. Fang's research primarily focuses on family firms, entrepreneurship, and strategic management. His works have appeared or are forthcoming in journals such as Entrepreneurship Theory & Practice, Journal of Product Innovation Management, Small Business Economics, Journal of Small Business Management, Management Decision, among others. He has received a number of Best Paper Award, Best Family Business Paper Award, Best Practitioner Paper Award and Honorable Mention and other scholarship in the U.S. Association for Small Business and Entrepreneurship (USASBE) conference, Family Enterprise Research Conference (FERC), Family-Owned Business Institute (FOBI) and others. He also served as track chair/organizer in academic conferences such as Small Business Institute conference and European Academy of Management conference."



DAVIS FARMER

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"Davis Farmer is an experienced entrepreneur in the life sciences. He has been involved in more than a dozen start-up companies as a VC, founder, CEO, board member and key advisor. He has formed companies in the US, Great Britain, New Zealand and Russia. His current focus is on the burgeoning life science sector in Turkey."



WALTER FRAME

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"Walter Frame is Executive Vice President & Director at Trapp Family Lodge in Stowe Vermont; implementing the business activities for the 2,500-acre resort. Prior to Trapp Family Lodge, Mr. Frame was Vice President and Director of Real Estate Development at Spruce Peak Realty, LLC (AIG Global Real Estate), for the period 2003-2011 where he administered all development, governance and operations for the planned resort community Spruce Peak at Stowe. Prior to his ventures in Vermont, Frame was a regional financial controller for Destination Hotels & Resorts, a hospitality & property management company. Walter is a Trustee for Copley Hospital, Stowe Land Trust, Vermont Business Roundtable, and Spruce Peak Arts Center Foundation. Walter Frame earned a BS from Babson College and an MBA from Boston College."



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"Judy Green is the president of the Family Firm Institute (FFI), a global association of individuals and organizations that study and serve family enterprise. A frequent commentator on the family enterprise field, she is co-author of the upcoming eBook, Family Enterprise: Understanding Families in Business and Families of Wealth (Wiley 2014) and a recent article in Family Business Review, "The Effects of Goal Orientation and Client Feedback on the Adaptive Behaviors of Family Enterprise Advisors." She holds a Ph.D. from Marquette University and was the 2008 recipient of the FFI Barbara Hollander Award. Green was a judge in the 2013 IMD - Lombard Odier Global Family Business Award and will be a judge for the 2014 Family Wealth Report Awards 2014 given by ClearView Financial Media Ltd in the UK."



CAROLE GREENBERG

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"Carole Nagelsmith Greenberg is a marriage and family therapist in private practice and has served on the board of numerous nonprofit organizations and as a trustee of a family foundation. As part of her private practice, she has consulted with numerous family businesses. Prior to her private practice, she co-founded a consulting firm that specialized in corporate relocation and provided services to Fortune 500 companies including Mobil, Exxon and Westinghouse. Ms. Greenberg received her MS in Counseling and Human Resources from the University of Bridgeport and her post graduate degree from the Family Institute of Westchester. She has a BS in Nursing from the University of Vermont."



DANNA GREENBERG

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"Danna Greenberg is the Walter H. Carpenter Professor of Organizational Behavior. Danna's primary area of research examines how people craft full work and nonwork lives throughout their careers. The broad questions that drive her research are how do people manage work-life transitions in today's demanding work world, how does this influence their identity, engagement, and performance at work, and how do organizational and societal factors influence an individual's integration of work-nonwork. She is currently working on a forthcoming book entitled Momish: Crafting Your Work-Life Story. Danna's second stream of research centers on the scholarship of teaching and learning. Here she is focused on the continued changing landscape of higher education and how can we innovate and expand current pedagogy to better support the cognitive, emotional, and character development of future entrepreneurial leaders."



SWATI GUPTA

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"Swati Gupta manages analysis, contracts, engineering, procurement and technology at her family business firm that constructs specialized buildings for the Government of India. She graduated with University and College Honors from Carnegie Mellon University, having earned BS degrees in Electrical and Computer Engineering, and Economics, plus minors in Computer Science and Computational Finance. Currently enrolled in the Management Program for Family Business at the Indian School of Business, Swati is also part of the Youth Business Leaders Forum at the prestigious PHD Chamber of Commerce in New Delhi. A regular at talks and panels, she is also an artist. She recently showcased 70+ artworks at her solo exhibition that was inaugurated by the Union Minister of Culture, Tourism & Civil Aviation of India."



STEPHANIE HAINLEY

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"Stephanie Hainley is the Chief Operating Officer and Senior Project Manager at White + Burke Real Estate Investment Advisors, running the firm day-to-day and providing third-party development services around the State of Vermont. Stephanie is also on the Board of Trustees of Champlain College, is a Director of the Northfield Savings Bank Foundation board, sits on the board of Main Street Alliance of Vermont board, and sits on the board of Leadership Champlain through the Lake Champlain Regional Chamber of Commerce. Her work with the Chamber also includes sitting on the Public Policy Committee and the Advocacy Task Force. She is the immediate past president of Burlington Business & Professional Women (BPW) and serves as a corporator to Northfield Mutual Holding Company. Stephanie received her BA in sociology from UVM and MBA from Champlain College. She is passionate about policy supporting gender equality, economic development, and workforce stability. Stephanie enjoys dancing, hiking & cooking and lives in Burlington's South End."

ELLE HANSEN

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"As the managing partner of ReGENERATION, Elle's primary focus is on advising family enterprises on succession, conflict management, governance, and communication. ReGENERATION is exclusively devoted to increasing shareholder value and improving communication in family enterprises. Elle helps families put structures, systems and policies in place that prevent breakdowns and improve relationships. Specifically, Elle is determined to help families find the balance necessary for a rewarding life. Elle thrives on helping families domestically and internationally identify opportunities and solutions to puzzling family business challenges. She facilitates family retreats designed to provide a unique family experience by combining business development and relational bonding. The memories created at these family gatherings are just one aspect of RXP, an adventure-based experience offered exclusively by ReGENERATION. Elle serves as the lead consultant for development and training of emerging adults. She also hosts strategic planning and educational seminars. Prior to ReGENERATION, Elle was the Director of OEM Sales and Project Management for Matrix Shafts, a family enterprise. Her former professional experience also includes serving in the Composites division of Fujikura, one of the largest international firms in the world. Elle also served as the VP for Baxter Elevator, a Dallas-based family firm."



REJEANA HEINRICH

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"Rejeana Heinrich has been leading the Stevens Center for Family Business at Saginaw Valley State University in the Great Lakes Bay Region of Michigan for thirteen years. During this time, the Center has grown from a relatively small "program" to an endowed center whose membership has steadily increased, and whose number of sponsoring partners has more than tripled. The Center has engaged more than 1,000 family business leaders from about 350 different family-owned companies in educational and networking events, contributing to their understanding and implementation of FB best practices. As part of the University's College of Business and Management, the SCFB also contributes to academic programs for students – the College offers a Concentration in FB Management – and to original research, with about 12 members of the CBM's faculty engaged in family business research projects. Rejeana's background is in marketing and public relations in the higher education and health care sectors."



SUSAN HOLSON

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Holson Communications
USA

"Susan Holson has been in and around family businesses her whole life. Her father, uncle, and grandparents founded and operated The Holson Company, a Connecticut manufacturer of photo albums for the consumer and professional markets, which they sold in the 1980s. She fondly remembers family dinner table discussions about the issues they confronted with employees, customers, and vendors. While pursuing her own marketing career on Madison Avenue in NYC, Holson occasionally partnered with her father in consulting family business in issues of generational transition. Eventually, when she relocated to Vermont in the 90s, Holson undertook her first entrepreneurial adventure. After 10 years of publishing a newspaper (for families) during which time she also partnered with her sister producing original theatrical works, she sold the business locally and embarked on a stint in academia, where she taught business and humanities courses at several Vermont colleges."



JAMES HUTCHESON

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USA

"James Olan Hutcheson is the Founder of ReGENERATION Partners. Jim has more than 40 years of "hands-on" family business management and family business consulting experience. Jim began his professional career with Olan Mills, Inc. in 1976 as a part-time telemarketer and resigned his position as President and CEO of Olan Mills Studios in 1995 to establish ReGENERATION Partners. During his 20 year career with Olan Mills, he developed and led the organization to over 15,000 employees and more than 1,000 locations throughout the United States, Canada, and the United Kingdom. During his leadership tenure the company grew at an annual rate exceeding 27%. In addition to degrees in Psychology, Sociology, and an MBA, Jim has received an Honorary Doctorate of Laws. Jim has been awarded Fellow status in FFI and has been awarded the Richard Beckhard Practice Award. Jim and his firm, ReGENERATION Partners, have been awarded the Greater North Texas Business Ethics Award."



ADAM IFSHIN

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DLC Management Corp.
USA

"Adam Ifshin is the CEO of DLC Management Corp., a company he founded in 1991. Well versed in the complex world of foreclosures, bankruptcies, and restructurings, he oversees DLC's acquisitions and dispositions, capital markets activities, redevelopments, joint ventures, and corporate strategy. Over the last 25 years, with over \$4.5 billion in real estate transactions, he has built DLC into one of the nation's largest owners and operators of retail real estate."

Mr. Ifshin received a BA, cum laude, from Williams College, with honors degrees in economics and history, and was elected to Phi Beta Kappa. Mr. Ifshin is a member of the Executive Board of Trustees of the International Council of Shopping Centers ("ICSC"), and Chair of the ICSC Government Relations Advisory Committee. He is a Council Counselor and full member of the Urban Land Institute ("ULI") and a past Chair of ULI's Retail Council (Blue). He has testified on behalf of the real estate industry in both the House of Representatives and the Senate on the issue of Carried Interest. In 2010 and in 2014, Mr. Ifshin was a finalist in the Entrepreneur of the Year Program run by Ernst & Young. He is past Chairman of the Byram Hills Educational Foundation and is involved in numerous charitable organizations. Known as a thought leader in the industry, he has guest lectured at the University of Vermont and New York University, and he mentors emerging entrepreneurs through a business plan program at Williams College."



JON JAMIESON

Jamieson Insurance Agency Inc.
USA

"Jon Jamieson is the Principal of Jamieson Insurance Agency in Waitsfield, Vermont. Jon has worked in the industry since 1992, both in the agency business and for insurance companies. Jon has been a Certified Insurance Counselor since 1995 and believes that personal attention and professional advice are just as important to the customer as a competitive price. The Agency has a commitment to community service demonstrated by both time and financial support for numerous organizations. The Jamieson Family has been in the insurance business in Vermont since 1865. The Agency is currently in its second generation of family ownership with the transfer of ownership from Dick Jamieson to Jon Jamieson in 2004."



LUIS JIMENEZ-CASTILLO

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"Luis is a PhD Student that is focusing on Family Business. His research interests are Internationalization, Strategy and Corporate Governance. Before pursuing his degree at WPI, Luis was a faculty member at Universidad Panamericana in Mexico. In there he had the opportunity to be a member of the Advisory Board of the Family Business Management Bachelor's Program. He is not only is interested academically to help family business, but as well as a practitioner, since he was part of the Board of Directors of his family's firm, where he served as the Chairman of the Board; and as a consultant for other family managed companies. Has published some articles in local business magazines regarding succession and conflict management on the family business. The concentration is on entrepreneurship, and the research topics of interest are international entrepreneurship, internationalization of family businesses and corporate governance of family businesses."



LUIZ RICARDO KABBACH DE CASTRO

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"Prof. Luiz Ricardo Kabbach de Castro, PhD, is an assistant professor and director of the Center of Excellence in Family Firms at the Industrial Engineering Department, at the São Carlos School of Engineering, at the University of São Paulo. Luiz Riccardo has pursued his PhD at the Universidad Autónoma de Barcelona. His main research interests are related to corporate governance and strategy, particularly, in emerging economies and family firms. Luiz Ricardo has been visiting scholar at the University of Illinois at Urbana-Champaign, USA, in 2010/2011, and has taught corporate governance and strategy courses at Universitat de les Illes Balears (Espanha), Universidad Adolfo Ibáñez (Chile), IBMEC (atualmente INSPER). He teaches undergraduate and graduate courses in Economics, Strategy, Corporate Governance, Family Business Management. He was awarded with the best paper at the Academy of International Business - Latin American Chapter 2013 Annual Meeting."



TAKAO KAWAMOTO

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Japan

"Takao Kawamoto established his own consulting company, Glorious Co., Ltd., in Japan in 2015, after he earned an MBA at Claremont Graduate University in the USA. His career began with Mitsubishi Corporation, one of the largest trading company in Japan. He was involved in food trading for over ten years with special emphasis on the operations and structure of the Japanese food industry. His experience at Mitsubishi involved interacting with many small to middle sized family business companies. He is also a member of a family business confectionery company in Japan. As a result, while completing his MBA he completed an elective family business class"



MICHAEL KELLER

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Gallagher, Flynn and Company, LLP.
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"As a general services partner of Gallagher, Flynn & Company, LLP and co-managing partner since 2004, Mike is responsible for providing and coordinating on-going accounting, auditing, tax, and business advisory services to a substantial number of clients. Mike also works with and advises many not-for-profit entities. In June of 1985, Governor Madeleine Kunin appointed Mike to the Vermont Board of Accountancy, a governmental body that regulates the profession. Mike served on the board for three years, retiring as chairman in 1988. In 1989, the Vermont Society of Certified Public Accountants appointed Mike to the executive committee of the New England Quality Review Program. Mike joined the firm in 1979 after receiving his Bachelor of Science degree in Business Administration from the University of Vermont. Mike has served as chair of the Lake Champlain Regional Chamber of Commerce and currently serves on the chamber's board and audit committee. In addition, Mike is co-chair of South Burlington Business Association, a member of the South Burlington Rotary Club, the American Institute of Certified Public Accountants, and the Vermont Society of Certified Public Accountants."



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"Charles Kittredge is Chairman of the Board and former Chief Executive Officer of Crane & Co., Inc. Kittredge is a sixth-generation descendant of Zenas Crane, who founded the company in 1801. With its headquarters in Dalton, Massachusetts and facilities in New Hampshire, Georgia, and Sweden, Crane specializes in the manufacture of banknote papers, printed banknotes, passports and counterfeit deterrent security features for the United States and central banks around the globe."



MICHAEL KLEIN

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"Michael is a consulting psychologist and author of "Trapped in the Family Business: A Practical Guide to Uncovering and Managing this Hidden Dilemma." He serves as an advisor and facilitator to individuals in family businesses on issues including family conflict, professional and personal development, and transition strategy. Michael has over 15 years of experience working with industries including pharmaceuticals, financial services, construction, education, agriculture, healthcare, commercial real estate, manufacturing, information technology, and entertainment. He is a recognized member of the American Psychological Association (apa.org) and Society for Industrial and Organizational Psychology (siop.org), and is a frequent speaker to family business centers, international advisor associations, and other industry groups. His book and work have been featured in The New York Times, USA Today, as well as numerous trade and industry-specific publications and online media."



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"Danforth Pewter is a 41-year-old family enterprise headquartered in Middlebury, Vermont, which Bram Kleppner has led as CEO for six years. After a number of years of losses, the company under his tenure has enjoyed six straight years of profitability and growth. He has instituted company-wide profit-sharing and paid maternity leave, led a successful acquisition, and converted the company to 100% solar power. Prior to working at Danforth, Bram spent ten years at Ben & Jerry's leading international marketing and international business development, a position which included managing Ben & Jerry's joint venture in Russia, in addition to working in W. Europe, Asia and South America. Complementing his business ventures, Bram works on health care reform in Vermont as Co-chair of Vermont's Medicaid & Health Care Exchange Advisory Board and as a member of the Health Care Working Group at Vermont Businesses for Social Responsibility. He also advocates for women's rights and the environment."



HESTER KUYPERS - VAN DER SLUIS

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ITMGroup
Netherlands

"I was born in 1968 in Zwolle, The Netherlands. I studied law at the University of Amsterdam and worked as a lawyer in Rotterdam for three years. I have three children in the age of 14 to 19. I started to work in our family business, ITM Group, in 1997. Because of my legal background my main focus was contracts, HR and tax-issues. Nowadays I am the group legal advisor, assistant to the ITM Group Board and director of our Holding. Our company is based in Kampen, The Netherlands, with her biggest affiliate in Radom, Poland. We employ nearly 1,000 people. Our turnover has grown to 200 million Euro in 2016. My great grandfather started our company in 1911. He traded in tobacco and made cigars. His son started the trade in second hand cigar machines and his sons, my father and uncle, started to first overhaul machines for the tobacco industry. Later they also build new machines. Nowadays we develop and build machines not only for the tobacco, but also for other industries."



SEAN LARKIN

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Logic Supply
USA

"I am currently the CFO / COO of Logic Supply, a hardware technology company whose operations have expanded to Asia and Europe. There I am responsible for the maintenance and development of a global finance, human resource, logistics, production, fulfillment, procurement, and customer service teams that can sustain annual double-digit global growth."



RICHARD LUFF

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Sagamore Golf, Inc.
USA

"President and co-owner of Sagamore Golf, Inc., a 4th generation family business that operates two 18-hole golf courses and a full service driving range in New Hampshire and Massachusetts. Richard's family started the company in the midst of the first Great Depression with the simple formula of treating customers as you would want to be treated and by providing a great product at a great value. Sagamore's commitment to our customers, staff, community, and environment provides the foundation for our decision making. The resulting loyalty of our repeat customers and the near zero turnover of our staff remain unique in the industry. Sagamore is the Founding Partner of The First Tee of New Hampshire (TFTNH), whose mission is to impact the lives of young people by providing educational programs that build character, instill life enhancing values, and promote healthy choices through the game of golf. TFTNH is headquartered at our Sagamore Golf Center location."



PAM MACKENZIE

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State of Vermont-Department of Economic Development
USA

"Over 30 years of leadership experience with a strong track record developing and implementing strategic direction for public and private sector organizations. Recognized as a leader in employee development, operations, business development and community involvement. Recently joined the State of Vermont, Department of Economic Development to manage the implementation of the Economic Development Marketing Plan."



FLAVIO MALAGA

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AR Metallizing/Málaga
Brazil

"Flávio Málaga is currently country manager (Brazil) and VP for M&A at AR Metallizing/Málaga, the largest producer of metallized paper for labels, located in Belgium, and a subsidiary of Nissha Printing Japan, a Tokyo-exchange listed company. In 2008, Flávio took over the managing director position at his 50 year-old manufacturing family business, and during his tenure, structured, professionalized, internationalized and grew the business. In 2015, after a 10 month negotiation period, sold the company to the largest global player in the segment. Besides his executive career, Flávio has an MBA from Boston University, and a MSc. and a Phd in Finance from Universidade de São Paulo. He teaches Corporate Finance at the MBA program of Insper, one of the top business schools in Brazil."



PETER MCRAE

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McRae Capital Management, Inc.
USA

"Peter has a background in both the corporate and investment worlds, with particular experience internationally. He started his career in corporate finance with Lucent Technologies, including an assignment in the Netherlands in which he worked extensively with teams from around the globe. Prior to joining McRae in 2004, Peter worked at Merrill Lynch as an equity analyst, where he developed strong research skills by teaming with the number-one-ranked utility-industry analyst. Peter is a graduate of the University of Vermont, has an MBA from Columbia University, and is a Certified Financial Planner (CFP®). Outside of work, Peter volunteers as a mentor with Big Brothers, Big Sisters of Essex, Hudson, and Union Counties. He is a member of the Investment Subcommittee for the Foundation for Morristown Medical Center as well as a member of the O. Berk Company Family Business Forum at Fairleigh Dickinson University"



MAGDALENA MEUSBURGER

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FH Vorarlberg University of Applied Sciences
Austria

"Magdalena Meusburger teaches and researches in the area of Entrepreneurship and Innovation at Vorarlberg University of Applied Sciences in Austria. She holds a PhD in Entrepreneurship from the University of Pretoria in South Africa and a Masters degree in International Business from the Vienna University of Economics and Business. Magdalena has a strong international focus, plus wide-ranging practical experience as an entrepreneur and in the field of new venture creation. She has already started two ventures: one that has achieved impressive growth in just 5 years and a social entrepreneurship initiative for underprivileged youth in South Africa. Right now she is coaching several Startups and working on some of her own. On a personal note, Magdalena is an avid adventure traveller and has crossed through the Taklamakan Desert in West China. She loves mountain climbing and snowboarding."



JAMES MOUNT

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Mount Family Group, LTD
USA

"James Mount is the second generation owner of Mount Family Group, LTD in Burlington, VT. He has been involved in the family business since 1997 and completed the ownership transition in 2010. He is an active member of the community who has served on several volunteer boards. Mount Family Group owns and operates Westaff and Remedy Intelligent Staffing Franchises in four New England states and in New York. James has served as a judge for the FECC annually since its inception."



ROGER NADEAU

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Agri-Mark/Cabot Creamery
USA

"With over 27 years of HR experience in the dairy manufacturing, utility, medical and retail industries, Roger has used his extensive HR management and recruitment skills to identify talent who not only meet today's needs but who also demonstrate the potential to capably handle tomorrow's challenges. His firm belief is that organizations always win when the right individuals are selected and when a mutual investment and partnership is the primary focus."



LAURA O'REILLY

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Gleener Marketing Inc.
Canada

"Laura O'Reilly is a past FECC competitor, having won the competition in 2015. Family enterprise consulting has become a passion project for her, as she continues to read and study the subject matter and hopes to go into the field in the future. Graduating with a Marketing degree, Laura began working for a small company in Montreal, Canada, in their marketing department. Two years later, she now leads the new product development team, where she executes the development of new products and brings them to market. Laura is excited to combine her past case competition experience, entrepreneurial spirit and knowledge of family enterprise as a consultant in the future."



ALEXANDRINA PAUCEANU

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Dhofar University
Oman

"Alexandrina Maria Pauceanu is a dedicated assistant professor at Dhofar University in Sultanate of Oman and in Switzerland, where she is mentoring doctoral students. She believes in combining theory with practice through consulting, community service and entrepreneurial activities. She is frequently invited as keynote speaker at various events around the world. Research interests are, but not limited to, entrepreneurship and related issues, SMEs, business performance, innovation management, sustainable development (especially through business incubators, technological parks, free zones and FabLabs) tourism management. Maria is member in several prestigious professional organizations in management, entrepreneurship and consulting. She is holding a PhD in management from Academy of Economic Studies in Romania and publishing research in prestigious journals. Among the most recent publications are: Entrepreneurship in Gulf Cooperation Council – Guidelines for starting and managing business, a textbook published."



STEPHEN PENWELL

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Morgan Stanley
USA

"Steve is a Managing Director in Morgan Stanley's Equity Research Department. He's been with Morgan Stanley for the past 27 years, in a variety of roles in the Equity and Fixed Income Research divisions. Steve received an MBA in Finance from NYU in 1990 and a BS in Finance from UVM in 1984. Steve has been involved with UVM as an actively engaged alumni for the past 12 years. Steve and his family live in Westport, CT."



ROBERT (BOB) PHILLIPS

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Royall Lyme Bermuda
USA

"Bob Phillips is an SJ Partners consumer products operating partner where he currently serves on the board and is an investor in their portfolio company, Osmotics Cosmeceuticals. He has served as a Senior Advisor to Peter J Solomon Company, and a Managing Director of The Clarecastle Group, a marketing company specializing in consumer and personal care products. From 1988 to 2000, Mr. Phillips was with Unilever PLC and Unilever NV where he served as the North American Business Group President and Global Coordinator of Personal Products. During his tenure at Unilever, he served as Chief Executive Officer of Elizabeth Arden Company Worldwide and Chairman of Unilever Prestige Personal Products which included Calvin Klein Cosmetics. In addition, Mr. Phillips was a Director of Unilever from 1994 to 2000. Prior to joining Unilever, Mr. Phillips held a number of senior brand management, marketing, and executive positions at Chesebrough-Ponds, Inc. including President and Chief Operating Officer which included the Stauffer Chemical business. Upon the acquisition of Chesebrough by Unilever in 1988, he was named President and CEO of the Chesebrough unit holding that office until 1992. From 1979 to 1981, Mr. Phillips launched General Entertainment Corp, a unit of Nabisco. He also has served as the President of the Clairol Division of Bristol Myers. He began his career with the Kool Aid Division of General Foods. Mr. Phillips received a B.A. from Dartmouth College, an M.B.A. from Columbia Graduate School of Business, and an M.A. from the Columbia Graduate School of Arts and Sciences. Mr. Phillips completed active duty in the US Army Counterintelligence Corps attaining the rank of First Lieutenant."



GERI REILLY

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Geri Reilly Real Estate
USA

"Geri Reilly, a native Vermonter and University of Vermont alumna, '79, grew up in Colchester and became a Realtor in 1981. Before deciding to open her own real estate company, Geri Reilly Real Estate, located in South Burlington Geri worked at Coldwell Banker for over 13 years. It was there that Geri was the #3 residential Realtor in the Northeast. She has been a top residential real estate agent since 1983, consistently selling over 125 homes a year, as well as being decorated with many other awards and accolades over the last 35 years. She is a graduate of the Realtor Institute, a certified residential specialist and a certified buyer representative. Geri is well known in the community and is the go to person to get your home sold!"



HELEN RIEHLE

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So. Burlington City Council
USA

"Helen Riehle spent 10 years teaching middle school social studies, 18 years serving in the VT House of Representatives (10) and the VT Senate (8) and most recently completing the term of Sen Diane Snelling, and 15 years as an Executive Director of two non-profit organizations, the VT Program for Quality in Health Care and then the Champlain Valley Area Health Education Center. In the legislature she chaired the Senate Health and Welfare Committee, a member of Natural Resources and General Affairs and Housing. In the House she served on Appropriations, Administrative Rules, and Health and Welfare. Ms Riehle has been very active in numerous community boards and organizations. Currently she is chair of the South Burlington City Council."



TED RIEHLE

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SilverLake Wealth Management
USA

"Mr. Riehle graduated from UVM in 1970 with a BS Degree. He started his working career as a teacher and hockey coach at Mt Mansfield High School. In 1982 he was recruited to join Merrill Lynch. He was appointed to the Executive Club his first year which honored top 1% producers. An opportunity arose several years later and he joined Morgan Stanley where he had a successful career for 18 years as VP of Investments. In 2002 he formed his own investment advisory company with several other Morgan Stanley advisors under the name of Silverlake Wealth Management with clients in 25 states. Ted's service to community included Burlington School Commissioner, Burlington Board of Alderman President, and 3 terms in the Vermont Legislature. Presently, he is a member of the South Burlington Planning Commission. His hobbies include hiking the green mountains and New Hampshire white mountains with his 3 dogs. Biking the wonderful routes in Vermont and Canada."



BENJAMIN ROSA

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IBM Global Financing
USA

"UVM Business School Board Member Emeritus. Thirty year IBM veteran with various leadership roles in Finance, Marketing and Sales. Two children...Alexandria - senior Electrical Engineering UCONNN....Ben JR...4th year PHD candidate in Economics UPENN."



MICHELLE ROSOWSKY

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Marathon Health
USA

"Michelle Rosowsky is the Vice President for Business Performance and Strategy at Marathon Health, a national provider of worksite healthcare. She's responsible for identifying internal and external opportunities to improve Marathon Health's business performance and to maximize value for its customers. Michelle has over 25 years' experience helping organizations reach strategic goals through communication, process improvement, and outcomes assessment. She has an MBA, an MA in Rhetoric and Communication, and a BS in Exercise Science. She has worked in corporate fitness, coordinated international events in sports marketing, published numerous magazine and news articles, and served as a consultant on outcomes-based assessment to colleges and universities. She is also a seasoned triathlete with over 100 podium finishes to her name. She lives in South Burlington, Vermont with her family."



ROB RUSSELL

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Greystone & Co.
USA

"Mr. Russell has more than 20 years of real estate finance experience has executed transactions in excess of \$9 billion throughout his career. Prior to joining Greystone, Mr. Russell was the Chief Production Officer at Pillar Multifamily, LLC (an affiliate of Guggenheim Partners) and served as a Managing Director at Wachovia Securities, where his duties included originating and structuring debt/preferred equity transactions in the United States, and establishing Wachovia's lending operations in Canada. He has also held similar positions at Credit Suisse, Donaldson Lufkin & Jenrette and Nomura Asset Capital Corporation. Mr. Russell holds a Bachelor of Science in Business Administration from the University of Vermont and a Juris Doctorate from the Benjamin N. Cardozo School of Law. He serves on the Advisory Board of the Grossman School of Business at the University of Vermont."



GINNY SANTIAGO

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Asian Institute of Management
Philippines

"Professor Santiago is a full professor at the Asian Institute of Management in Manila, Philippines. She holds the Basant and Sarala Birla Professorial Chair in Asian Family Corporations. Prior to joining the Asian Institute of Management, Prof. Santiago was a full professor at De La Salle University (DLSU) also in Manila, Philippines. She held several administrative positions and was assigned special tasks during her tenure at DLSU. She was a member of the Board of Advisers of De La Salle Araneta University; Dean of the Graduate School of Business of La Salle University in Ozamis; Consultant for De La Salle Philippines. She was also the former Dean of the Ramon V. del Rosario College of Business of De La Salle University. She became a member of the National Capital Region-Quality Assessment Team of the Philippine Commission on Higher Education (CHED) and at one time was the Director for the Zonal Research Center for the National Capital Region, also of the CHED."



JEFF SAVLOV

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Blum & Savlov, Inc. - Family Business Consulting
USA

"Jeff Savlov is a consultant to enterprising families and is the founding principal of Blum & Savlov, Inc, Family Business Consulting. He works with families at the intersection of family dynamics and ownership, management and leadership of shared assets. Jeff speaks and writes extensively and authors a popular blog - "The Family Business Minute." He worked in his family's commercial printing business before a career in sales and marketing and then returned to graduate work in family and group dynamics. Jeff is also a family therapist and certified psychoanalyst. Currently, he combines all these experiences practicing as a family business/wealth consultant working with multi-generational, enterprising families and their advisors to help families achieve sustainability. Key areas of interest are: sustainability of family wealth, values led family and business, entrepreneurialism in enterprising families as key to long-term success, family governance, development of the next generation."



STEVE SCHLESINGER

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Schlesinger Associates
USA

"Steve has been in the marketing research industry for over 30 years, starting his career as a project manager and then working his way up to lead Schlesinger Associates for the past 20 years. As a leader within his company, Steve has created the strategy and vision for Schlesinger Associates as the world's best data collection company. Served for 8 years on the board of the Marketing Research Association, finishing his tenure as the Secretary of the Board. He is a founding member of the CEO Summit and continues his involvement, in 2014 co-chairing the event in Napa. Steve is an active member of AMA, CASRO, CMOR, ESOMAR, EphMRA and PMRG. He was presented the MRA Honorary Lifetime Member award in 2015, in recognition of a lifetime commitment of outstanding individual service to the Marketing Research Association and the marketing research profession. Steve serves on the board of directors of Inspire.com, the board of directors of Free All Media, the advisory board of The University of Vermont Foundation."



ART SEBASTIANO

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Ken's Foods, Inc.
USA

"Art Sebastiano is an accomplished CIO with extensive and successful leadership through strategic inflection points and "fix and grow" business conditions across \$20M - \$1.7B private and public organizations. Experience across Consumer and Business Services industries with extensive experience in Supply Chain, Manufacturing, Retail, High Tech (hardware & software), Telecommunications, Medical Device and eBusiness within the global marketplace. He is a dynamic leader with experience in multimillion-dollar revenue and profit gains; large-scale technology implementations; leadership contributions to M&A, start-up, and turnaround initiatives. His unique blend of business acumen, operational effectiveness and technology allows him to be highly impactful across diverse business models."



PAUL SESSIONS

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University of New Haven, College of Business
USA

"Paul L. Sessions Director Center for Family Business email sessionspl@gmail.com University of New Haven Paul L. Sessions has been Director of the Center for Family Business of the University of New Haven since 1996. The Center currently has as Members 54 Connecticut family businesses. Paul is a Fellow of the Family Firm Institute and holds their Certificate in Family Business Advising. He maintains his own private family business advising practice and is experienced in issues relating to closely-held and family businesses, particularly: transition and succession, interpersonal communication, building and rebuilding trust and conflict resolution. He is skilled in facilitating both large and small groups, and has considerable knowledge of the Enneagram and personality. Sessions worked for 17 years in his family's 6th generation manufacturing business, ultimately serving as president for 8 years and selling the company in 1993."

"The UVM Family Enterprise Case Competition represents the greatest concentration in the world of highly talented business students, faculty and judges thinking deeply about family business."

**-BRAM KLEPPNER
CEO, Danforth Pewter
USA**



APOORVA SRIVASTAVA

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"Mr Apoorva Srivastava is a researcher and business owner. He is associated with Energy Hedge Funds Industry. Apart from AMNAYA Energy which focuses on intelligence and business development within oil and energy, Apoorva is also associated with GLG Research in New York, Econovision in Rotterdam and Moran Strategy Group on Alexandria, VA as Consultant on project management and startups. Mr. Apoorva Srivastava is keenly interested in trade facilitation, economic viability and government centred projects within and around Asia. Of his interests, Apoorva likes to play soccer, travel around, connect with people and is devout Shaivite!"



LESLIE BLACK SULLIVAN

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University of Vermont
USA

"Leslie Black Sullivan spent 25 years in the investment business. She began her career on Wall Street at Bear Stearns and Smith Barney in New York City. She then served as a Vice President at American Express Asset Management and as a Vice President at First Asset Management in Minneapolis before becoming the Managing Director of Okabe-na Advisors, a money management division of the Dayton family investment office. Her interests include the arts and humanities and animal protection and welfare. She is on the boards of the Vermont Symphony Orchestra and Burlington City Arts. Previously, she was on the boards of the Humane Society of Chittenden County, Artspace (a national leader in artist-led community transformation based in Minneapolis, Minnesota), the Frederick R. Weisman Art Museum at the University of Minnesota and the Bridges to Learning Foundation. Leslie is a graduate of the University of Vermont and holds an International Diploma in Humanitarian Assistance from the Institute of International Humanitarian Affairs at Fordham University."



CHRIS SWAFFIN SMITH

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Raynor Foods Ltd & Regents University
UK

"Chris is currently a non executive Director of a rapidly expanding second generation family business in the UK The company manufactures a range of food to go products for the airlines ,universities ,schools ,hospitals and private customers His responsibilities relate to corporate governance ,strategy , and change. He has, during his career, worked in this capacity for a number of family businesses He has been a consultant to many smaller family businesses and has worked with advisers and businesses in Hong Kong ,Laos, Thailand, Hungary, Spain, and India He has developed and run a series of workshops on family business issues for Bank staff , Accountants, and Lawyers Finally he has been a visiting member of faculty for a number of Universities in the UK and at Temple University in Philadelphia During this time he has; set up a Family Business Centre, developed and delivered, a number of family business modules for undergraduate and post graduate students ,and published a number of relevant articles."



CHUCK TAUCK

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Sheldrake Point Winery
USA

"Chuck Tauck worked for Tauck Tours in various roles until 1992, and after completing a graduate program at Cornell in 1994, returned to organize his family's business for its third generation succession. Today, the company is 90 years old and already involved in 4th generation planning. In 1996, Chuck joined a group transforming a New York dairy farm into a vineyard. Today, Sheldrake Point Winery has 44 acres of grapes, produces 8,000 cases of wine and hosts 25,000 visitors annually, and is recognized as one of the top wineries in the Finger Lakes. Chuck graduated from the University of Vermont in 1976."



ROBIN TAUCK

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Tauck, Inc.
USA

"Robin Tauck is a travel business leader, governing co-owner, and former president and CEO of Tauck, Inc. This third-generation global travel company offers luxury land, small ship cruising, river boating, event, and safari travel since its founding in 1925. She is a graduate of the University of Cambridge Sustainability Leadership Program (2006), the Stanford University Executive Business Program (1999), and the University of Vermont (1977), which honored her with the "Legacy of Leadership" Award in 2000. She is a U.S. Commissioner of UNESCO at the State Department, and in 2015 was honored with the "Connecticut Women's Award" for Global Action."



STEVEN TROTSKY

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Collaborative Consulting, LLC
USA

"Steven Trotsky is a highly accomplished executive with a proven record in the successful design, development and implementation of advanced technology solutions to Financial Services professionals. Steve has achieved repeated success by developing and implementing innovative strategies driving geographic expansion, operational efficiencies, cost reduction, new products and applications. He is a strong leader with a proven track record of successfully delivering against goals and a builder of high-performance teams and organizations. Prior to becoming an independent consultant, Steve held multiple roles over a 17 year career at Fidelity Investments including Fidelity Pricing and Cash Management Services, Fidelity eBusiness Retail Development, Fidelity Employer Services, and Fidelity Investments Institutional Services. Before joining Fidelity Steve was the CFO of a large architectural design firm and has held senior financial roles in medical technology, communications, and the defense industry."



STEPHAN VAN DER MERWE

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North West University School of Business and
Governance
South Africa

"STEPHAN VAN DER MERWE is a Professor at the School of Business and Governance at the North-West University in South Africa. His expertise lies in entrepreneurship and family business research."



SRINIVAS VENUGOPAL

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University of Vermont, Grossman School of Business
USA

"Srinivas Venugopal is an Assistant Professor of Marketing at the University of Vermont. Srinivas's research examines the intertwined nature of consumption and entrepreneurship in subsistence marketplaces where more than a billion poverty-stricken entrepreneurs run micro-enterprises to meet basic consumption needs. Srinivas's research on entrepreneurship in subsistence marketplaces has been published in reputed journals such as the Journal of Public Policy and Marketing, Journal of Macromarketing and Marketing Theory. Prior to his joining the academia, Srinivas led a technology-based social venture, which focused on delivering educational services to low-income consumers in rural India. He continues to run a social enterprise that is focused on promoting girl's education in several low income neighborhoods (slums) in the city of Chennai in India."



RANDY WAESCHE

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Resource Management, LLC
USA

"Randy Waesche has spent his 34 years as a financial consulting pioneer guiding Resource Management, LLC. to national prominence. He is active professionally and in the community serving on numerous committees and Boards. Professionally, he is currently serving on the Financial Planning Association (FPA) Investment Committee and is a former national board member for the Institute of Certified Financial Planners, the predecessor of the FPA. Civically, Mr. Waesche is on the Board of Directors and Executive Committee for the Mary Bird Perkins Cancer Center; a nationally recognized center of excellence for cancer treatment, and is the Chairman Elect for the Northshore Community Foundation. In the past, he has served on the Boards of the Lake Pontchartrain Basin Foundation, the West St. Tammany Parish YMCA, and the St. Tammany Parish Economic Development Foundation. In addition to his wealth management activities, Mr. Waesche has a subspecialty in family business advising."



THOMAS WARING JR.

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Family & Business Directions, LLC
USA

"Tom has been active in the financial services industry since 1982 and is the founder of Waring Financial Group and co-founder of GCW Capital Group and GCW Capital, LLC. Tom focuses on serving closely held family businesses, key executives and high net worth individuals. He provides his clients with holistic business and personal financial planning including business succession planning, estate analysis, insurance planning, investment solutions, selective key employee and employer benefits and charitable giving. He is also CEO of Family & Business Directions, LLC, a consulting business established in 2010 to help business owners and families to successfully develop "Family Wealth" sustainability. He also serves as a Director and Human Resources & Compensation Chair of Evans Bank. Tom resides in Hamburg, New York."



MARK WETXEL

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Fiduciary Investment Advisors

USA

"Mark is President of Fiduciary Investment Advisors, LLC (FIA). He is a member of the firm's investment committee and works with corporate, non-profit, and captive insurance clients. Prior to founding FIA, Mark was a Senior Vice President and PRIME Consultant at UBS Financial Services Inc. and was the national Chair of the Advisory Committee. In addition to serving on or chairing multiple non-profit boards and investment committees, he has also served on the corporate pension committees as a fiduciary for both UBS Financial Services, Inc. and Novartis Corporation. Mark has been in the industry since 1990 and has received many industry recognitions for his contributions. He regularly speaks at industry conferences and has been published numerous times."



KEN WEXLER

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Elaine Construction Company

USA

"Ken is the second generation of Wexlers responsible for the overall direction and sustained growth of Wexler Construction and Elaine Construction. Ken joined the firm, founded by his father, Leo A. Wexler, in 1965. As President from 1975 - 2006, Ken took an active role in Elaine Construction's delivery of service to a diverse client base, focusing his attention on client relations, and building and retaining a team capable of delivering consistently high-quality service which goes beyond the traditional construction management role. His technical knowledge of the construction process and his vast experience make him an invaluable resource to clients and staff alike. As Chairman, Ken continues his involvement through a variety of community and professional activities, as well as mentoring and training Elaine Construction staff."



LISA WEXLER

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Elaine Construction Company
USA

"Lisa is the third generation of Wexler's responsible for the stewardship and growth of Elaine Construction as a full service construction management firm. Lisa is proud to serve a solid base of repeat clients who continue to select Elaine Construction for a variety of projects ranging from multi-floor commercial build-outs to sophisticated research laboratories. As President, Lisa is committed to the successful management of every project that is awarded to Elaine Construction. For nearly 20 years, Lisa has led a variety of construction projects for a broad range of clients. Her clients directly benefit from her knowledge of the construction process and her ability to build and retain a team dedicated to Elaine Construction's clients' success. Lisa is currently on the Board of Directors for Women Empowering Leadership and Learning, the AGC of Massachusetts and the Mayyim Hayyim Center and actively raises funds for The Ronald McDonald House and Rosie's Place."



TOM WHEELER

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AW Brown Pet and Garden Store
USA

"Family business owner for over 30 years in the retail pet, garden, and related industries. Winner of the 2013 UVM 1st Generation Family Business Awards. UVM B.S. 1977; UCONN M.B.A. 1992."



JOHN WILKING

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Neville Companies Inc
USA

"John Wilking is President and founder of Neville Companies, a commercial and investment real estate management firm with assignments throughout New England. John has been actively involved in real estate management and ownership for 35 years. John serves on the South Burlington Development Review Board, is a Director on the Board and Chair of the Education Workgroup for the Vermont Business Roundtable, a member of the Board of Green Mountain Habitat for Humanity, a founding Board member of the South Burlington Business Association, and a Rotarian. John is a 1981 graduate of St. Lawrence University and has an extensive background in construction and architecture. John lives in South Burlington, VT with his wife, Wanda. He has two nearly grown and very ambitious children, one of whom is in the business school at the College of William & Mary."



PETER WILLSON

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Wilson International Ltd.
Canada

"Peter is the 4th generation owner of Willson International. Prior to joining the company Peter worked with Ernst & Young focusing in the audit of mining companies. Willson International specializes in Customs brokerage and logistics with a predominant focus on Canada-US Trade. Peter sits on the Ontario Advisory Board for the Heart & Stroke Foundation, and through Willson International provides financial support to organizations such as Trillium Health Centre, The Oakville Hospital, Start2Finish, Art House, St. Mildred's Lightbourn School and the Heart & Stroke Foundation. He has served as a Director and Chair of the Upper Canada Chapter of Young Presidents Organization, has been a member of the Regional council for YPO and of the Regional Board of Directors. Peter served as a director of the Trillium Health Centre Foundation, from 2007 to 2013 and as Chair of the Foundation from 2010 to 2013."



PAUL WOODFIELD

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Auckland University of Technology
New Zealand

"After a decade traversing the property industry in consulting, contractor, and engineering roles, Paul's journey continued with the completion of a Master of Business Innovation and Entrepreneurship (MBIE) comprising time in Germany studying the dynamics of European and international business. Paul's interests are now centered on entrepreneurship and innovation, particularly in family businesses and traditional industries. He also has a specific interest in wine businesses stemming from his family heritage of winegrowers. His recent research has concentrated on investigating ways entrepreneurial family businesses can be sustained across generations, and exploring innovation in traditional industries. Paul considers himself an entrepreneur and innovator enabler which is channeled through teaching, research and advisory roles."



ROBYN WORRALL

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Ren-Pharm
USA

"After graduating from the business school at the University of Vermont in 2014, I immediately began working in sales in the tech industry. After gaining as much of the best sales experience I could cold calling daily, I began working for my family business in January 2016. My mother began her business by herself in 1990, working with one pharmaceutical supplier, and was able to establish Ren-Pharm as one of the most well respected API agents in the US for the generic pharmaceutical industry today. After competing in FECC for UVM in 2014, and placing second, I knew I had gained a tremendous amount of knowledge about all of the obstacles in entering your own family business."

NOTES

University of Vermont

Grossman School of Business

www.uvm.edu/business



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