



family business roundtable
OF PITTSBURGH
SINCE 1992

Features

“Spouses Surviving and Thriving in Business”

Wednesday, January 26th, 2005

The Rivers Club – Ohio

5:30pm – 6:30pm

Networking and hors d’oeuvres

6:30pm – 8:00pm

Program and Discussion

Welcome – Rich Snebold, Chairman of FBR
John Febert – Vice Chairman, Membership Chairman
Elaine Jewart – Business Development Chairman

David Dietrich – Introduction and special thanks to tonight’s sponsors:

Ann Beigler

(Waiting on a Logo)

The Family Business Roundtable of Pittsburgh Program and Featured Panelists

Tonight's Program

Married couples that share ownership, management and responsibility for a business are known as co-entrepreneurial couples or “copreneurs”. Some copreneurs start a business together. In other cases, one spouse already is in business and the other spouse joins them. Working with your spouse is rewarding and challenging and requires patience and thoughtfulness to make both the marriage and the business successful.

When working with your spouse is good, it's very, very good. When it's bad, though, it's really bad. Sharing work can make both the marriage and business better and the bonds can grow stronger. But, everyday tensions and frictions can build into greater discord when working together and can destroy both the business and the family. Having no boundaries between work and home can create problems at both places. Typically, people have strong opinions on working with spouses. It's either “I'd love to do that” or “I could never do that”.

We expect a lively discussion among our panel of couples in business and family business consultants and the program attendees on how to successfully maneuver through the minefield of potential problems of working together to strengthen the marriage and the business.

Tonight's Moderators

Thomas B. Smith, ASA

Thomas B. Smith, ASA and Lorraine M. Smith, ASA are principals in Smith Evans Carrier, LLC, a professional business valuation firm specializing in the appraisal of closely held securities for such purposes as gift tax, estate tax, ESOPs, mergers and acquisitions, marital dissolution, and litigation support.

Thomas B. Smith is an Accredited Senior Appraiser with the American Society of Appraisers. He is a charter member and current board member of the Family Business Roundtable. Mr. Smith has a B.A. in Economics and an M.B.A. in Finance from the University of Pittsburgh. He has over thirty-one years of experience in the appraisal of closely held business interests. He was formerly a Vice President and Senior Administrative Officer at Pittsburgh National Bank, where he was responsible for the administration and management of closely held business interests in the Investment Management & Trust Division. Mr. Smith has presented many seminars on financial management and business estate planning for family business owners and is on the faculty of the Pennsylvania Bankers' Association (PBA) Central Atlantic School of Trust, where he lectures annually on the administration of closely held business interests.

Lorraine M. Smith

Lorraine M. Smith is an Accredited Senior Appraiser with the American Society of Appraisers (ASA). Ms. Smith is a charter member of the Family Business Roundtable and she served four years as board member. Ms. Smith has a B.A. in Economics from the University of Pittsburgh. She served three terms as President of the ASA Pittsburgh Chapter and also currently serves on the Chapter's Board of Directors. She served two two-year terms (2001-2003) as the Regional Governor to the American Society of Appraisers for Region One, which includes the chapters in Pennsylvania, New Jersey and Delaware. She also served a two-year term on the ASA International Budget and Finance Committee. Ms. Smith has spoken on business valuation to area industry organizations, continuing education classes at local universities, area chapters of the Pennsylvania Institute of Certified Public Accountants, various estate planning councils in Pennsylvania and West Virginia, and the U.S. Small Business Administration.

Tonight's Panelists

Introducing our panelists who will be joining Tom and Lorraine Smith:

Jim Kwaiser is a Certified Management Consultant and is a quoted expert in Alan Weiss's new book "The Ultimate Consultant." Jim is recognized as a leading Family Business expert and in working with Family Business Leaders on effectively resolving relationship, performance and planning issues. Jim has over 30 years of assisting many hundreds of successful individuals, family businesses, associations and public companies, through his personal consulting, comprehensive programs and straightforward facilitation. Mr. Kwaiser has held positions of General Manager, Executive Vice President, and President with many large grocery wholesale companies, local and regional Family Businesses, Fortune 500 corporations, as well as owning his own businesses in Michigan and Pennsylvania. Jim is a professional member of the National Speakers Association, President of the Institute of Management Consultants of Western PA, a featured author of the book "The Communication Coach ... Business tips from the pros" and (with his wife and partner, Ann Marie founded C.H.A.L.L.E.N.G.E.S. inc. in 1993. They specialize in working with Families in Business and Leaders of Companies and Organizations.)

Ann Marie Kwaiser has devoted over 30 years of her life as a registered nurse, teacher, trainer and consultant in the areas of physical and relationship health. Ann Marie has taught and practiced in Michigan, West Virginia and Pennsylvania and brings a unique understanding of personal sensitivity to each consultation or work session. She has experienced first hand the need for relationship support for personal and business performance success as well as workplace satisfaction. Ann Marie is a recognized expert in the process of establishing workplace cooperation through the understanding of relationships, Performance and Planning. She is an independent certified facilitator for Og Mandino's "Keys To Success" process and is trained facilitator for the Equine Business Experience. Ann Marie and her husband Jim recently published "How to Survive the Challenges facing families in business tips booklet" - they should know they have been married 34 years and work together too!

Bruce Reissaus has over 20 years of business experience in Sales, Retail Store Management, Sales Training and as a Business Owner. His career has focused on Retail, Wholesale and Business-to-Business sales and promotion.

In 1995 Bruce founded Advertising Specialties Alliance (ASA) to introduce clients to the power of the strategic use of promotional merchandise to meet organizational objectives. Bruce has provided promotional strategies and products for Financial, Insurance, Real Estate and Manufacturing industries as well as Sales Organizations. These have included programs for vendor recognition, employee performance recognition, company anniversary celebrations, student academic achievement recognition and comprehensive trade show promotions. Bruce's personal strengths lie in the areas of customer acquisition and retention and in helping clients with the human aspect of relationships with customers, suppliers, employees and referrers.

Bruce has a BS in Finance and Recreation, and is a Certified Advertising Specialist (CAS), a certification held by fewer than 10% of Promotional Products professionals. He is active in the Cranberry Area Chamber of Commerce, where he serves on the Education Committee. He is also a member of Promotional Products Association International (PPAI) and the Three Rivers Advertising Specialty Association (TRASA), and serves on the Education Committee for TRASA.

Jennifer Reissaus is Bruce's partner in ASA. After a career of more than 23 years with manufacturers PPG (glass), Republic Steel (steel) and Bayer Corporation (chemicals and plastics), Jennifer became a full-time, active partner in ASA in January, 2002. She brings to ASA a background in a wide variety of fields, at the Associate, Supervisory and Management levels.

Jennifer's experience includes product management - new product development - logistics - supply chain management - developing and implementing information systems for inventory management, production planning / scheduling / reporting, and environmental reporting - developing processes and training for strategic procurement, new product development and employee safety / performance incentive programs. Her personal strengths lie in organization, process development and finding innovative solutions to problems.

Jennifer's professional certifications include CFPIM (Certified at the Fellow Level in Production & Inventory Management) and CIRM (Certified in Integrated Resource Management) from the American Production and Inventory Control Society (APICS). She is active in the Cranberry Area Chamber of Commerce where she serves on the Community Relations Committee and on the Board of Directors.

Together Bruce and Jennifer form a strong team, combining their strengths and talents to provide innovative promotional strategies and products to help their clients achieve their objectives.

The Family Business Roundtable
2004/2005
Calendar of Events

4 Evening Educational Roundtable Discussions

October, 21st 2004	<i>"Compensation, Communication, & Conflict"</i> An Evening Program with Jim & Ann Marie Kwaiser, & Panel
December, 2nd 2004	<i>"Siblings in Business Together"</i> Dr. David Dietrich & Panel Members – including Don Fazio (Diamond Wire Spring Co.)
January, 26th 2005	<i>"Spouses Surviving and Thriving in Business"</i> Tom & Lorraine Smith & Panel Members
March, 9th 2005	<i>"Compensation Communication & Conflict"</i> Jim & Ann Marie Kwaiser & Panel Members

All of our educational meetings will include family business owners and experienced family business advisors. All events will be held in the early evening.
Hearty hors d'oeuvres and refreshments will be served.

We encourage you to bring your children, key employees and guests.

4 Breakfast Roundtable Discussions

November, 10 th 2004	<i>“Managing Capital & Liquidity”</i> John Brown & Panel Members
January, 12 th 2005	<i>“Annual Tax Symposium”</i> Joe Stelmack, John Febert, & Leo Hitt
February, 9 th 2005	<i>“Finding Resources to Help Your Business”</i> Elaine Jewart & Panel Members
April, 20 th 2005	<i>“What Goes Wrong When You Don’t Plan Right”</i> Bob Williams & Roger Wise

All breakfast roundtable discussions include a “case study” appropriate for both family business owners and their advisors.

May, 13 th or 20 th 2005 (TBD)	<i>“3rd Annual Family Business Symposium”</i> 8:00am – 4:00pm In conjunction with The Family Business Center at Citizens
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The Annual Family Business Symposium includes economic updates and expert speakers on a multitude of subjects important to family businesses as well as other closely held businesses and their advisors.

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