Next Generation Institute (NGI)
Where current and future generations unite for success

Did you know that less than 30% of family businesses survive to the second generation? It’s time to think about your most complex, emotional business decisions ever.

For Owners/leaders (G1):
- When to transition
- Inclusive decision-making
- Contemplating post-leadership identity

For Successors (G2):
- Assessing true readiness
- Gaining co-worker and family acceptance
- Enhancing leadership skills

For Both:
- Understand business valuations
- Legal, financial and personal assessment issues

NGI is an eight step program to prepare both generations for the path to successful transition of leadership and ownership. Join the hundreds of family business executives we have helped on their journeys.

Current and future leaders learn together:
- How to create a mutual vision for your family business
- The eight steps to a seamless transition of control and ownership
- How a network of advisors and peers can be essential in this process
- How an outside board can be invaluable

“The preparation we received at NGI alerted us early to issues we would face and provided solutions that helped make our succession planning more effective.”

Mike LaRosa, CEO
LaRosa’s, Inc.

How do I register?
Dates and registration links are provided on the Goering Center website. You may also register by contacting the Goering Center.

Tuition:
Members $6,000
Non-Members $7,000
*Tuition is for one G1 and one G2. G1 spouse is complimentary. Each additional participant $2,500.

Tuition includes materials, continental breakfast and lunch, speakers, and classroom facilities.

Session topics include:
- Foundation of a Successful Transition
- Forming the Team
- Goals, Expectations and Contingency Planning
- Strategic Planning and Management
- Valuation and Financing
- Optimizing Legal and Tax Structures
- Communicating the Plan
- Developing a Plan of Action

ENROLL
Curriculum (Eight ½ Day Sessions):
- Interactive presentations with area experts on the keys to accomplish each of the eight steps
- Roundtable discussions with your peers
- Multiple members of each generation may enroll (A minimum of one G1 and one G2 is required)
- Both generations participate in each session
- Time for family discussions and sharing

Goering Center
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www.growyourfamilybusiness.com

*The Goering Center is a non-profit organization that is affiliated with the Lindner College of Business at the University of Cincinnati.

Thank you to our sponsors:

CLARK SCHAEFER HACKETT
STRENGTH IN NUMBERS

KATZ TELLER

PNC BANK
Reserve a spot now for 2015-16

**Dates**
Session 1: November 10, 2015  
Session 2: December 8, 2015  
Session 3: January 12, 2016  
Session 4: February 9, 2016  
Session 5: March 8, 2016  
Session 6: April 19, 2016  
Session 7: May 10, 2016  
Session 8: June 14, 2016

**Topics**
- The Principles of Succession  
- Step 1 Foundation of a Successful Transition  
- Step 2 Forming the Team  
- Step 3 Goals, Expectations & Contingency Planning  
- Step 4 Strategic Planning & Management  
- Step 5 Valuation & Financing  
- Step 6 Optimizing Legal & Tax Structures  
- Step 7&8 Communicating the Plan to all constituents & Developing a Plan of Action

**Our Faculty & Guest Speakers**

**Faculty**
Institute sessions are conducted by business experts in the various aspects of succession planning.

**Guest Speakers**
Many sessions include guest speakers from tri-state family businesses that have successfully completed the generational transition.

**Next Generation Facilitators**
Participants are divided into round-tables assisted by a facilitator to help each participant make the program content especially relevant to their family business.

**Safe Haven Policy**
The Goering Center respects the privacy of our members, and provides a safe haven environment. Members and presenters agree not to solicit other members. Names, addresses, and contact information are strictly confidential and are to be used only for member-to-member communications.

**Location**
The Next Generation Institute will take place at the Sharonville Convention Center 11355 Chester Road, Cincinnati, OH 45246

**Register**
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**Direct Enrollment for 2015**
https://goering.cincyregister.com/NGIEnrollment

Learn more about the Next Generation Institute (NGI). Contact Steve McLemore, Member Relations Director at (513) 556-7409.