

# AGENDA

## FRIDAY 19

- 8:00am-9:00am Welcome- Sanford Ehrlich, Executive Director of Entrepreneurship, SDSU Entrepreneurial Management Center  
Overview of the day- Carmen Bianchi, Director of the Business Forum, SDSU Entrepreneurial Management Center
- 9:00am-10:30am Jennifer Kearns, Duane Morris LLP- *"Technology-Friend or Foe"*
- 10:30am-10:45am NETWORKING BREAK
- 10:45am-12:15pm Bill Super, Moss Adams, LLP- *"What I Wish I Knew Before I Sold My Business"*
- 12:15pm-1:30pm LUNCH
- 1:30pm- 3:00pm John Cardosa, Union Bank-Introduction  
Kei Matsuda, Union Bank and David Goerz, HighMark Capital- *"Economic and Investment Outlook"*
- 3:00pm-4:45pm Suzanne Audiss, The Audiss Group, LLC- Sales- *"Getting More Out of Your Current Sales Team"*
- 5:00pm COCKTAILS
- 6:00pm-6:15pm Welcome - Gail Naughton, Dean, College of Business, San Diego State University
- 6:15pm-6:45pm Music - Quartet
- 6:45pm-7:30pm DINNER
- 7:30pm-8:30pm A.G. and John Spanos, San Diego Chargers- *"Challenges of This Generation"*
- 8:30pm-8:45pm Overview of next day- Sanford Ehrlich & Carmen Bianchi

## SATURDAY 20

- 8:00am-9:00am Breakfast - Richard Beaton and Linda Wagener, Marigold Associates, LLC  
- *"RaisingYour Kids Right: Advanced Strategies in Risk Mitigation"*
- 9:00am-10:30am Track One  
Stephanie San Antonio and Keith Eck, Keith Eck Financial and Insurance Services  
- *"Optimize Your Employee Benefit Package and Control Costs"*  
- *"Life Insurance: Permanent or Term. Which is the Right Choice For You?"*
- 9:00am-10:30am Track Two  
John Yi, KES and Martin Staubus - *"ESOPS: Creating Shareholder Liquidity: Building A Motivated Workforce"*
- 10:30am-10:45am NETWORKING BREAK
- 10:45am- 12:30pm Track One  
Rob Slee, Randy Godshall and Bob Copeland, Sheppard Mullin Richter and Hampton, LLP  
- *"BuildingYour Company's Value for a Liquidity Event and Estate for Your Family"*
- 10:45am- 12:30pm Track Two-Mary Gust, Frank Crystal & Company *"Insurance Issues and Solutions for Family Enterprises"*
- 12 :30pm-1:30pm LUNCH with speaker Kurt Listug, Taylor Guitars *"The Making of a Market Leader: The Taylor Guitars Story"*
- 1:30pm-3:00pm Track One-Todd Poling, Vantage Point Advisors - *"Value Building Case Study"*
- 1:30pm-3:00pm Track Two  
-Mike Howard, Ernst & Young and Bill Super, Moss Adams, LLP- *"Crystal-Balling' the Possible Tax Legislation in 2010 and Beyond"*
- 3:00pm-3:15pm NETWORKING BREAK
- 3:15pm-4:15pm Wilson Creek Winery Family Panel Discussion
- 4:15pm-4:30pm Wrap up and Evaluation
- 4:30pm COCKTAILS AND WINE TASTING