

THE EMC BUSINESS FORUM PROUDLY PRESENTS THE
SIXTH ANNUAL CLOSELY-HELD AND FAMILY BUSINESS RETREAT

STRATEGIES FOR MOVING FORWARD IN CHANGING TIMES

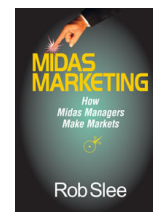
PRESENTING:

The Souza Family, Pyro Spectaculars

Gregg Koch, Stone Brewing Company

The Lundberg Family Farms

Rob Slee, Midas Marketing



APRIL 15–16, 2011
THE INN AT RANCHO SANTA FE
The Stories. The Wisdom. The Facts

MEET TOP EXPERTS WHO CAN HELP YOU BUILD YOUR BUSINESS:

With over 30 local CEOs, expert speakers, and leading family service providers, this retreat will provide you with the answers you've been looking for and numerous networking opportunities.

FRIDAY 15th

- » 8:00am - 9:00am BREAKFAST/NETWORKING
WELCOME and OVERVIEW OF THE DAY:
Sanford Ehrlich, Executive Director of Entrepreneurship, SDSU Entrepreneurial Management Center,
Carmen Bianchi, Director of the Business Forum, SDSU Entrepreneurial Management Center
- » 9:00am - 10:30am *New Laws-New Interpretations*
Jennifer Kearns, Duane Morris LLP
- » 10:30am - 10:45am NETWORKING BREAK
- » 10:45am - 12:15pm *What Every Executive Should Know About Social Media Marketing*
Bernhard Schroeder, EMC Director
- » 12:15pm - 1:30pm LUNCH
- » 1:30pm - 3:00pm Union Bank-Introduction
John Cardosa
Economic and Investment Outlook
Kei Matsuda, Union Bank
- » 3:00pm - 3:15pm NETWORKING BREAK
- » 3:15pm - 4:00pm *Keeping the Family in the Family Business*
Tim Schultz, Lundberg Family Farms
- » 4:00pm - 5:15pm *Wonderful, Colorful World of Pyro Spectaculars by Souza*
Jim Souza and Family –Pyro Spectacular
- » 5:15pm - 6:30pm COCKTAILS/NETWORKING/FIREWORKS DISPLAY
- » 6:30pm - 6:45pm WELCOME
Gail Naughton, Dean College of Business, San Diego State University
- » 6:45pm - 7:30pm DINNER
- » 7:30pm - 8:30pm *In Search of the Midas Touch*
Rob Slee –Founder of Midas Nation
- » 8:30pm - 8:45pm OVERVIEW OF THE NEXT DAY:
Sanford Ehrlich & Carmen Bianchi

SATURDAY 16th » 8:00am - 8:30am BREAKFAST/NETWORKING:

- » 8:30am - 10am TRACK ONE: *7-STEP SALES*
Dale Stein –Technology Assurance Group
- » 8:30am - 10am TRACK TWO –*Succession: Income & Tax Considerations*
Moss Adams CPA's Bruce Knowlton & Sheryl Rowling
Succession: Dollars and "Sents"
Merrill Lynch-Damien Lanyon
- » 10:00am - 10:15am NETWORKING BREAK
- » 10:15am - 11:45am PLENARY: *Anatomy of an Exit-An Owner's Story*
Stuart Sorenson, Todd Poling, Duane Morris, Vantage Point Advisors, Linda Bradley President, Crissair Inc.
- » 11:45am - 1:15pm LUNCH
- » 1:15pm - 2:45pm TRACK ONE: *Health Care Reform and How it Effects Your Business*
Stephanie San Antonio, Keith Eck Financial and Insurance Services
The Importance of Life Insurance Policy Audits
Keith Eck, Keith Eck Financial and Insurance Services
- » 1:15pm - 2:45pm TRACK TWO: *Financial Empowerment: Educating Children about the Responsibilities of Wealth*
Jacqueline Parks, US Trust
- » 2:45pm - 4:00pm PLENARY: *Leadership: Are You Swift?*
Holly G. Green, Managing Director THE HUMAN FACTOR, Inc.
- » 4:00pm - 4:10pm WRAP-UP AND EVALUATION
- » 4:10pm - 5:30pm NETWORKING /BEER AND WINE
Greg Koch, Stone Brewing Company