

# Sample Annual Agenda

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
			All Day: FBF Gathering (Families and Sponsors only)			All Day: FBF Retreat (includes public)				All Day: FBF Gathering (Families and Sponsors only)	
Monthly: Governance Structure and Hope is a Great Conversation	Monthly: Sponsored presenter	Monthly: Keep and Grow the Business or Transition 1 of 3 ways		Monthly: Family Alignment - The Secret Ingredient	Monthly: Sponsored presenter		Monthly: Sponsored presenter	Monthly: Estate & Business Planning	Monthly: Charitable Planning with Lavin		
	Social: Annual COF - Gala night						Social: Beach dinner night with Sponsors				Social: Holiday Open House

OFFERING FOR 2021 ONLY (COMPLIMENTARY)	
October 13; 2:30 - 5:00pm Social / Networking and Announcements at Clubhouse Grill	November 10; 2:30 - 5:00pm Monthly Roundtable (all sectors): When Governance Runs Into Estate and Business Planning

Southern California Institute Family Business Forums (FBFs) in Association with San Diego State University's Lavin Entrepreneurship Center, serve the unique educational (legal, financial, tax, governance, & succession), interpersonal, and growth needs of families through yearly programming that includes: 8 monthly roundtable sector family meetings, 3 FBF group full day conferences, and 3 FBF group social events.

First started in 2004 and coordinated through Carmen Bianchi, FBFS provide for three distinct sectors of family business: up to \$20million, \$20 - \$80million, and over \$80million in annual revenue.

Please complete the registration form at [www.scinstitute.org/fbfsponsor](http://www.scinstitute.org/fbfsponsor) to receive the Sponsorship Application