



# FAMILY BUSINESS FORUMS

In Association with San Diego State University Lavin Entrepreneurship Center

## 2022 ANNUAL FAMILY MEMBERSHIP APPLICATION

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/development needs of family business members by providing entrepreneurial education, resources, and peer support through *yearly programming that includes:*

- 8 monthly round table 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 (*please select the group that applies*):

- Group 1 - up to \$20mil annual business revenue
- Group 2 - \$20mil - \$80mil annual business revenue
- Group 3 - \$80mil+ annual business revenue

\$9,000 per family per annum (includes two reserved seats for each family at each event)

### APPLICATION FOR MEMBERSHIP:

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Company \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_ Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Additional Participants:

Name \_\_\_\_\_ Title \_\_\_\_\_ Email \_\_\_\_\_  
 Name \_\_\_\_\_ Title \_\_\_\_\_ Email \_\_\_\_\_

### ADDITIONAL BENEFITS INCLUDE:

- Methods to accelerate growth of business and/or prepare for a transition
- Tools to create sound estate, tax, and succession plans
- Improve corporate governance and family alignment
- Creation and the use of an outside board of advisors
- Motivate key employees and family business successors
- How to create a code of ethics
- How to establish a family council and family creed (family firms only)
- Invaluable, confidential discussions between fellow family business members (directory included)
- Interaction with nationally renowned experts
- Opportunities to interact with and mentor Lavin Center students

Thank you for your interest! Please return this form to Shelley Lightfoot at [sl@scinstitute.org](mailto:sl@scinstitute.org). We will contact you shortly with next steps. If you have questions, please call 858-200-1911.