

# 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

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.

To learn more go to [www.scinstitute.org/family-business-forums](http://www.scinstitute.org/family-business-forums) or call Nae at 858-200-1911