



## Conducting Effective Family Meetings for Family Businesses

*Presenter:*

**Christian Stewart, Managing Director, Family Legacy Asia (HK) Limited**

### Course Details:

|  |  |  |
|--|--|--|
| <b>Date:</b> 2 June 2016, Thursday   | <b>Language:</b> English                                       | <b>CPD Law Points:</b> 1.5             |
| <b>Time:</b> 1:00 pm – 2:30 pm   | <b>Level:</b> Standard <sup>3</sup>                            | <b>CPD BC Law Points:</b> 1.5          |
| <b>Venue:</b> Room 201, 2/F,<br>Prosperous Building,<br>48-52 Des Voeux Road Central,<br>Hong Kong | <b>Fee:</b> HK \$800 (with lunch);<br>HK \$700 (without lunch) | <b>CPT Hours<sup>1</sup>:</b> 1.5      |
|  |  | <b>IFPHK CE Credits:</b> 1.5           |
|  |  | <b>CFA CE Credits<sup>2</sup>:</b> 1.5 |

To ensure that a family business is able to thrive for generations it is imperative that family members are able to communicate in an effective and organized manner, while at the same time respecting boundaries. A well governed family business will ensure that each of family, ownership and business “circles” have their own communication and decision making forums. As such, conducting effective meetings for family businesses can help improve the success and longevity of these operations. The following course will provide an overview of how, why and when to conduct these meetings.

### Highlights of the course include:

- Overview of Family Businesses
  - Key Characteristics & What makes them different?
  - The importance of preserving family emotional commitment
  - Authentic family harmony requires trust and communication
- Family Meetings as distinct from other kinds of meetings that need to occur in a well governed family firm
  - Family communication forums and decision making forums
- Different kinds of family meetings
  - Meetings to deal with the ongoing business of the family
  - Meetings with an educational focus
  - Meetings where the process of communication is critical
  - Family meetings and family councils – what is the difference?
- Family Meeting Ground Rules & Codes of Conduct
- How do you use family meetings to improve family communication
- How do you use family meetings to deal with conflicts
- Family Meetings in the context of Asian culture
- Facilitating the family meeting

**Note 1 – CPT Requirements:** Our courses can fulfil CPT requirements. The Securities & Futures Commission has advised that although formal endorsement will not be given for the training we provide, it does not mean that the training programmes we organize do not meet the CPT purpose. Registrants should note that your employer, as **the corporate licensee** of your SFC registration, **is responsible for determining** whether our courses or any training course satisfy CPT requirements i.e. **that the training you receive are of appropriate standard and relevance to your maintaining and enhancing the technical knowledge and professional expertise.** Please check with your employer before registering for our courses. C&S does not warrant that the attendance of our courses would automatically be recognized by the SFC as fulfilling your CPT requirements.

**Note 2 –** As a participant in the CFA Institute Approved-Provider Program, C&S has determined that this program qualifies for 1.5 credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE Diary.

**Note 3 – Standard:** for those who have basic knowledge of the topic

\*For registration conditions & further queries, please contact our office at (852) 2901-1333 or visit our website at <http://www.courses-seminars.com>

Enjoy up to 10% Discount for Online Registration!

## Registration Form

### Course Details:

**Course Name:** Conducting Effective Family Meetings for Family Businesses

**Course Code:** CPD1601764

### Participant(s) Details:

Firm / Company: \_\_\_\_\_  
Contact Person: \_\_\_\_\_ Nature of Business: \_\_\_\_\_  
Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Address: \_\_\_\_\_

Please make additional copies, if necessary:

Name of Attendee 1: Dr. / Mr. / Mrs. / Ms.  
*(as on practicing certificate or registration of trainee solicitor contract)*  
Job Title: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Solicitor No. / CFA Member No.: \_\_\_\_\_ Place & Year of Admission: \_\_\_\_\_  
 CPD Law Pts required     CPT Hours required     CE CFA     Others: \_\_\_\_\_  
Certificate required:     Yes     No

Name of Attendee 2: Dr. / Mr. / Mrs. / Ms.  
*(as on practicing certificate or registration of trainee solicitor contract)*  
Job Title: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Solicitor No. / CFA Member No.: \_\_\_\_\_ Place & Year of Admission: \_\_\_\_\_  
 CPD Law Pts required     CPT Hours required     CE CFA     Others: \_\_\_\_\_  
Certificate required:     Yes     No

Name of Attendee 3: Dr. / Mr. / Mrs. / Ms.  
*(as on practicing certificate or registration of trainee solicitor contract)*  
Job Title: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Solicitor No. / CFA Member No.: \_\_\_\_\_ Place & Year of Admission: \_\_\_\_\_  
 CPD Law Pts required     CPT Hours required     CE CFA     Others: \_\_\_\_\_  
Certificate required:     Yes     No

Cheque for HK\$ \_\_\_\_\_ enclosed

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Payment Methods:

To reserve your seat(s), please complete the registration form and forward full payment of course fee via one of the following methods:

- Make cheques payable to "Courses & Seminars Limited" and mail your payment together with this registration to our office (Room 201, 2/F, Prosperous Building, 48-52 Des Voeux Road Central, Hong Kong).
- Submit cash / cheque payment in person at our office (Room 201, 2/F, Prosperous Building, 48-52 Des Voeux Road Central, Hong Kong).
- Direct transfer to our account at HSBC (102-437431-001).

For registration conditions & further queries, please contact our office at (852) 2901-1333 or visit our website at <http://www.courses-seminars.com>