

3rd Annual Family and Closely Held Business Summit

Co-sponsored Event
October 26, 2017 | 12:00-4:30 p.m.
Seattle, WA

Garvey Schubert Barer, [Bader Martin, PS](#), [BMO Capital Markets](#), [Pillar International Insurance Advisors](#) and [Key Private Bank](#) are co-hosting the 3rd Annual Family and Closely Held Business Summit on Thursday, October 26, 2017 at the [Bell Harbor International Conference Center](#) in Seattle, WA. It will address the pressing issues that will impact family and closely held businesses now and in the future.

WHO SHOULD ATTEND

Executives, owners and managers of family and closely held businesses.

KEYNOTES AND PANELS

Key Private Bank's Chief Investment Officer, [George Mateyo](#), will share insights on current investment trends

[Jim Warjone](#), former CEO of fifth-generation, family-owned Port Blakely Companies, discussing succession planning challenges

Two roundtable sessions: the first, featuring advisors from law, accounting, investment banking, insurance and wealth management showcasing a cohesive strategy to tackle typical family business issues; the second, featuring regional executives for a 360° view of business succession planning and exit strategy

ATTENDEES WILL BE ABLE TO

Leave the program equipped with practical, actionable strategies for addressing challenges facing family and closely held businesses.

AGENDA

11:30 a.m. - 12:00 p.m. - **Registration**

12:00 - 12:30 p.m. - **Lunch**

12:30 - 1:15 p.m. - **Keynote – *What to Expect When You’re Investing*** | [George K. Mateyo](#) | Key Private Bank

1:15 - 1:30 p.m. - **Coffee Break**

1:30 - 2:30 p.m. - **Advisors Roundtable**

[Harold E. Snow, Jr.](#), Owner | Garvey Schubert Barer

[David Stiefel](#), Managing Principal | Director of Family Business Services | Bader Martin, PS

[Cameron M. Hewes](#), Managing Director | Mergers & Acquisitions | BMO Capital Markets

[Rodney A. Bench](#), Principal | Pillar International Insurance Advisors

[Francis Brown](#), Wealth Specialist | Senior Vice President | Key Private Bank

2:30 - 2:45 p.m. - **Coffee Break**

2:45 - 3:15 p.m. - **Keynote – *Successful Successions*** | [Jim Warjone](#) | Engel & Völkers (former CEO of Port Blakely Companies)

3:15 - 3:30 p.m. - **Break**

3:30 - 4:30 p.m. - **Family Business Executive Panel**

Shaiza Damji, Principal and Managing Director | 360° Hotel Group

Geoff Larson, President and Co-Founder | Alaskan Brewing Company

Foss Miller, Founder | Pacific Research Labs

4:30 - 7:00 p.m. - **Cocktail Reception**
