



----- CLE SEMINAR -----

3rd Annual Family Business Update

LIVE SEMINAR: **Wednesday, December 12, 2018 | Madison**
WEBCAST: **Wednesday, December 12, 2018**

REPLAY WEBCAST: **Thursday, December 27, 2018**
WEBCAST: **Friday, January 4, 2019**
WEBCAST: **Tuesday, January 8, 2019**
WEBCAST: **Monday, January 14, 2019**
WEBCAST: **Wednesday, January 23, 2019**

CREDITS
7 CLE
1 EPR

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Keep the family business from becoming a family failure

Representing a closely-held business is anything but business as usual. Your clients want profitable businesses that aren't tied up in litigation. But family and other close-knit relationships can jeopardize day-to-day operations.

The *3rd Annual Family Businesses Update* gives you the background and techniques to help your clients' organizations run smoothly and steer clear of litigation. Receive an overview of:

- Recent case law involving:
 - ▶ Personal guaranties
 - ▶ Arbitration clauses
 - ▶ Family vendettas
- The latest insurance issues
- Shareholder litigation strategies
- Answers to common ethical questions
- The Tax Cuts and Jobs Act's impact on small businesses

Ending inequality for female business owners

Explore the hidden factors you may not even realize are barring women owners from acquiring necessary decision-making power in the business. Hear a panel discussion of successful female business owners on how to recognize these barriers and overcome them. It's time to get down to business. **Register today!**

Who should attend

- Business lawyers
- Tax attorneys
- Insurance lawyers
- Business & civil litigators

How you'll benefit

- Stay in the know on recent legal developments in family business law
- See how the Tax Cuts and Jobs Act is impacting small businesses
- Learn what's happening in the realm of insurance
- Discover how to prevent and mitigate family business blow ups
- Understand the barriers to advancement faced by female business owners
- Find out how to identify who your client is and when you can waive a conflict

Additional Learning Opportunities

A Template for Family Business Succession Planning – 2018

Learn to create an outline for clients' family business succession planning. Understand how initial stages of succession planning can impact later steps. In addition, receive advice for counseling your clients through the major steps of succession planning. **1.5 CLE**

CLE OnDemand™ Seminar: #CA2825D | **Member:** \$109 | **Nonmember:** \$159

A Guide to Employment Terms and Compensation of Key Personnel in Family Businesses – 2017

Know the essentials of employment contracts, including confidentiality, noncompete, and severance provisions. Learn how to best execute an employee stock ownership plan. Also, discover techniques for creating retirement and benefit plans for key personnel. **6.5 CLE**

CLE OnDemand™ Seminar: #CA2657D | **Member:** \$249 | **Nonmember:** \$329

Trending Topics in Business Litigation 2018

Explore how Wisconsin's new Rules of Civil Procedure will impact business litigation. Learn the significant new changes to Wisconsin's class action statute. Dig into the details of procedural litigation issues, plus much more. **8 CLE/1 EPR**

Live Milwaukee Seminar & Live Webcast: Nov. 29, 2018

Webcast Replays: Dec. 10, 2018 | Dec. 21, 2018 | Dec. 26, 2018 | Jan. 2, 2019 | Jan. 11, 2019 | Jan. 15, 2019 | Jan. 24, 2019 | Jan. 28, 2019

Organizing a Wisconsin Business Corporation

This fundamental resource explains the factors to examine when advising clients on their organizational structure choices. Find the forms and explanations for articles of incorporation, bylaws, subscription agreements, and share certificates.

Print Book: #AK0069; 496+ pp.; 4th ed. 2014-15 | **Member:** \$219 | **Nonmember:** \$269
Books UnBound® Subscription: #AE0069; **Member:** \$159 | **Nonmember:** \$199

Hiring and Firing in Wisconsin

Find a comprehensive overview of the Wisconsin statutes governing screening, hiring, and termination. This book discusses how federal laws impact the state's employment practices. It also covers discrimination in hiring, testing and screening, providing references, and more. (Includes 2017-18 supplement)

Print Book: #AK0206; 304+ pp.; 6th ed. 2015-16 | **Member:** \$89 | **Nonmember:** \$109
Books UnBound® Subscription: #AE0206; **Member:** \$159 | **Nonmember:** \$199

Business Law Forms Library

Forms at your fingertips. Access more than 50 forms for agreements, articles of incorporation, bylaws, checklists, taxes, and other business-related needs. All forms are easy-to-modify templates, follow statutory specifications, and ensure you include all required information.

Online subscription: #FB2000 | **Member:** \$89 (Discounts available on multi-user subscriptions.)

Schedule

8:00 AM Registration

8:30 AM Recent Developments in Family Business Law

Learn lessons from lawsuits, court decisions, and other legal developments involving family businesses in the last 12 months. Topics include:

- Solving the Kafkaesque math of personal guarantees
- Avoiding the paradox of litigating an arbitration clause
- Protecting the business from a family “vendetta”
Gregory M. Monday

9:30 AM Opportunities in the New Tax Law

- Maximizing the qualified income business deduction
- Expense deductions for business assets
- GILTI – what it is and why it matters
- Recommendations for managing itemized deductions
Julie M. Bogle

10:00 AM Break

10:15 AM Recent Life Insurance Developments

- Industry changes resulting from continuing very low interest rates
- Steps to help your clients manage policies and minimize negative surprises
John C. Zimdars, Jr.

11:00 AM Cage Match: Litigating Family Business Ownership Disputes

- Exit strategies and minority shareholder squeeze outs
- Terminating employee owners
- Voting trusts and other control limitations
- Potential claims against sibling fiduciaries
David J. Sisson

12:05 PM Lunch (on your own)

1:05 PM Barriers to Advancement for Women in Business

- Women-owned businesses now account for 39% of all U.S. companies, but have a long way to go to achieve parity with businesses owned by men. This panel will discuss:
- Examination of transition plans for the family business
 - What to do when a wife inherits an interest in the business, but has no decision-making power in the company
 - Deeply embedded cultural norms that serve as barriers to developing daughters and wives as business-owners
 - Including female family members in the succession planning process
 - Disparities in lending decisions leaving women-owned businesses less well capitalized than businesses owned by men

- Unconscious assumptions made by advisors regarding female roles and the suitability of women in leadership
Moderator: Julie M. Bogle
Panel: Diane Ballweg
Cristin Livezey
Tammy Parks
Kathy Schwarz
Maiken Westphal

2:35 PM Break

2:50 PM Ethically Representing Closely Held Businesses – Who’s Your Client?

- When do you need a waiver?
- When have you crossed the line?
- When do you need to give up representation?
- Sample language for conflict waivers
Gregory M. Monday

3:50 PM Program Concludes

Following program start time, webcast replay schedule will vary slightly from above listed times.

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits, including 1 Ethics and Professional Responsibility credit.**

The live seminar and live webcast on December 12, 2018 will also be submitted for Minnesota credit.

Faculty

Program Chairs & Presenter

Julie M. Bogle

BDO
Middleton

Gregory M. Monday

Reinhart Boerner Van Deuren, S.C.
Madison

David J. Sisson

Reinhart Boerner Van Deuren, S.C.
Milwaukee

Presenters

Diane Ballweg

Endres Manufacturing Company
Waunakee

Cristin Livezey

Full Compass Systems
Madison

Tammy Koester Parks

SVA Plumb Financial
Middleton

Kathy Schwarz

Schwarz Insurance
Prairie du Sac

Maiken Westphal

Westphal & Company, Inc.
Madison

John C. Zimdars, Jr.

The Zimdars Company, Inc.
Madison

Location

LIVE SEMINAR:

Madison, State Bar Center

5302 Eastpark Blvd., American Center,
(608) 257-3838

Registration

Online: www.wisbar.org/seminars
credit card or Ultimate Pass only

Phone: (800) 728-7788 » credit card
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Fax: (608) 257-5502 » credit card
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Registrations
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State Bar CLE/PINNACLE

Passbook Registrations: Passbook
Certificates must be received by the
State Bar at least one business day prior
to the event. For live seminars, walk-in
registrations with Passbook Certificates
are welcome.

Registration Cancellations: Please
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for information on PINNACLE registration
cancellation policies.

Course materials for those attending the seminar

Course materials are provided in
PDF format and are downloadable
from *myStateBar* on wisbar.org up to
four days prior to and 90 days after
your seminar. The PDF format is ideal
for creating an electronic library that
is easily stored, searched, and shared.
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attendees receive a free two-week trial of the Books
UnBound® version. Use discount code **CA2820** when you
order online or by calling (800) 728-7788.*

Understand the statutes governing all aspects of private
sector, non-union employment. Topics include:

- Hiring
- Technology use in the workplace
- Wages and hours
- Wrongful discharge
- Worker's compensation
- Employment discrimination
- Restrictive covenants
- And much more

Print Book: #AK0046; 2,080+ pp.; 6th ed., 2016-17; 3 vols. (includes 2017-18 supplement)

Member: ~~\$219~~ \$175.20 | **Nonmember:** ~~\$269~~ \$215.20

Books UnBound® Subscription: #AE0046

Member: ~~\$159~~ \$127.20 | **Nonmember:** ~~\$199~~ \$159.20

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3rd Annual Family Business Update

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$299	<input type="checkbox"/> \$329
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the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes
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