Director’s Reflection

What a fun, busy fall! We’ve hosted two well-attended mini forums and a lunch forum; we kicked off our new member-only sponsor series; launched our new website; and spent time visiting with many veteran and new members. We’ll talk more about those later in the newsletter.

But for me, truly the most enjoyable part has been visiting and reminiscing with several of our founding members. As part of a special video we are working on for our anniversary bash, we’ve met with many of our past leaders and had some great reflection about the Center over the years, how it started, what it’s become, and where we’ll be in the next 20 years. As we reminisced, we laughed a lot, fondly remembered those we’ve lost over the years, and talked about how the next generation is now taking the reins. And none of us could believe the Center is 20 years old, especially since none of us has aged a day! We hope you will join us on Tuesday, Nov. 13, to honor our founders and those who paved the way for us all over the past 20 years.

Jim Findlay, a founder, past board chair, active member of the Center and a respected leader in the community. We hope you can join us on Nov. 13 to hear Jim’s and others’ reflections on the Center.
20 Years and Growing

The Center looks forward to celebrating 20 years of learning and networking with the father/daughter team from Crane & Company Inc.: Charlie Kittredge, chairman of the board and former chief executive officer, and Eliza Browning, VP of the digital consumer division. Representing the sixth and seventh generations of the more than 200-year-old family business, Charlie and Eliza will share stories of longevity and innovation. The Center will also celebrate its astute community leadership over 20 years.

In addition to networking and reminiscing, we’ll honor our outgoing Advisory Board members, Mark Meyer of Shrader Tire & Oil, chair for the past two years; Malcolm Richards with Supplemental Staffing; and Professor Monideepa Tarafdar, a UT College of Business and Innovation faculty member.

This event is open to the public, so please bring anyone who’d like to attend! [Click here to RSVP!]

Looking forward to celebrating with you on Tuesday, Nov. 13. Networking begins at 5:30 p.m.; the program begins at 6:15.

Fall Events

Our last mini-forum this year will be on Dec. 4: Tips for Planning Once the Election is Over. Obama. Romney. Two very different economic plans that could impact the current tax and investment structures. A team from Plante Moran’s Wealth Management Group will host an interactive presentation on the potential tax and investment changes from the election, so bring scenarios the team can discuss. Click on the title to RSVP.

Here’s a rundown of our fall events:
"If you are what you do, when you don't, you aren't." A quote from our Sept. 11 mini-forum: Not Your Mama’s Retirement: How Boomers are Rewriting Retirement Rules, presented by Dale Seymour, Seymour & Associates.

We had a great crowd for our fall lunch forum at the Toledo Club. “Estate Planning in an Uncertain Estate Tax Environment” was presented by sponsors, Becky Breier with Huntington National Bank and Gary Miller with Eastman & Smith, Ltd. It’s always a good sign when there are tons of questions and networking afterward. An interesting fact we learned: George Steinbrenner died in a year with an unplanned year-long gap in the estate tax, thus avoiding the federal estate tax and saving his family hundreds of millions that would have gone to the government, ensuring they can afford an entire team of Alex Rodriguezes for years to come. His final win.
As always, thanks to our sponsors for lending their expertise and facilitating shared experiences among Center members. Remember that all Center forums and mini-forums are available for viewing on the Center’s website. For member log-in information, contact Angie Jones.

Here’s what’s new around the Center

**Sponsor Series**: In an effort to provide more benefits to our members, we’ve tapped the expertise of our sponsors and have created a series called *What You Need to Know Now – Insightful Tips on Current Business Trends*. In this series, our sponsors produce short, 5-10 minute videos explaining a current hot topic or trend in the business world. We encourage members to take advantage of this pertinent, relevant and timely information! Click on the sponsor series link above, enter your log-in information and click on the sponsor series folder on the left of the page. Members, please e-mail Angie if you need your log-in information. There are currently three videos posted:

- Part-Time/Full-Time Employee Status Under the Health Care Reform Act
- Act Now Before the 2012 Federal and State Gift Tax Laws Change
- Accountable Care Act — New Regulations Likely in 2013

The opportunity to interact through email with the sponsor presenters makes the series more relevant and customized to you! Thanks to Scott Newsom of Shumaker, Loop & Kendrick and David Krock of Eastman & Smith, LLC for being our first “sponsor stars.”

**Check out our new website!** The Center’s new website is more interactive, user-friendly, vibrant and effective. All the information you could need and want can be found on our website. We look forward to informing and hearing from you and we are always open to ways to make it even better.

**Like us on Facebook!** Facebook is a great tool to communicate with our members (and prospective members) and pass on information we gather through our family business networks. It’s also a way to highlight what our members are doing or press they’re receiving. You are a vital group, and we love watching what you are doing – make sure to like our page so you know what’s happening too! We have 85 people and pages who like us; help us get to 100!
Affinity Groups: Our latest affinity group is off to a fantastic start! Because many members tell us the affinity group is the best feature of the Center — and sometimes the only safe place they have to discuss difficult issues — we plan to add one or two more groups by the end of the year. Click on the Affinity Group link if you are interested in being part of a new group.
We’ve been busy visiting veteran and recruiting new members. This fall, Debbe and Center member Bill Steel (left) with Bard Manufacturing Co. met with Kirk Vahsaw (right) and toured family-owned Spangler Candy Co. If you’ve never been there and are in Bryan, Ohio, stop in! It was fascinating.

Welcome new members!
The Center would like to welcome our newest members:

SunnyFuels
Internet Payment Exchange

If you know of any family or business that would benefit from membership in the Center, please invite them to attend an event as our guest.

A New ITAC Program at UT
The College of Business and Innovation is pleased to announce the appointment of Paola Greene as the Trade Consultant of the Ohio International Trade Assistance Center (ITAC).

The ITAC is the newest member of the Ohio SBDC Network to provide assistance to small businesses in Northwest Ohio by promoting growth through exporting. The ITAC is hosted by Cleveland State University and University of Toledo College of Business, Global Business and Innovation and funded by the U. S. Small Business Administration and the Ohio Department of Development. For further information about the services offered by the Ohio ITAC, please or contact Paola Greene at 419.530.5682 or e-mail at paola.greene@utoledo.edu.

Other SBDC Network members in Northwest Ohio include:
- Ohio SBDC at Toledo Regional Chamber of Commerce;
- Ohio SBDC at Terra Community College;
- Ohio SBDC at Maumee Valley Planning Organization; and
- Ohio Manufacturing & Technology SBDC at Toledo Regional Chamber of Commerce.

Small Business is defined as a business with less than 500 employees. Visit www.OhioSBDC.com for additional resources! The Ohio SBDC Network is here to assist you in finding ways to grow your business. Ohio SBDC Mission: “Accelerate Ohio’s economy by helping people start, sustain and grow their businesses.”

Business Insights from Our Sponsors

Buy/Sell Succession Agreement
Courtesy of Ronald Bell Jr., Senior Vice President and Fifth Third Bank
expertise...the list goes on. Often what gets overlooked is a succession plan. It's important that you have a succession plan in place to ensure the continued legacy of your business.

Your wealth advisor can help you fund a Buy/Sell Succession Agreement by working with your legal and tax professionals.

A Buy/Sell Succession Agreement helps simplify a difficult transition period while providing adequate liquidity for the business to be purchased.

[Click here to read the article!](#)

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