20, 30, 40 + Years and Still Growing

A very happy new year to you! After celebrating the Center’s 20th anniversary, we move full speed ahead to 2013 and beyond. With a visionary and precise focus, we strive to improve each and every Center event and initiative, while innovating and benchmarking to meet the needs of future generations and experienced family business leaders.

The 20th anniversary celebration was fantastic! More than 150 members, sponsors and friends of the Center attended and enjoyed seeing old friends making new ones, watching the founders’ video, and honoring Center Advisory Board leaders such as Jim Findlay and Dale Seymour. Jim Findlay is chair emeritus of our board and has provided 20 years of insights and passion for the Center, as well as support for our annual recognition event through The James and Celia Findlay Fund. Dale Seymour, Seymour & Associates, also has been a “fine mind” and avid supporter for the Center for 20 years. We look forward to both of their continued stellar leadership.

Please take a few minutes and watch our founders reflect on the Center. If you weren’t able to attend the celebration, you can watch the Crane and Co. presentation on legacy and innovation in their family business, which is more than 200 years old.

Below are some pictures from the event. Check out our Facebook page for album with all the photos.

We can’t wait to celebrate the next 20 years of The University of Toledo Center for Family & Privately-Held Business with you. You all play a vital role in our success and progress. Thank you!
For more information, contact David Krock at 419.247.1679.

For more information, contact Alex Gerken, Senior Vice President, Business Banking Executive, at 419.259.6936.

For more information, contact Kevin Gilmore, CPA, CVA at 419.794.2000.

For more information, contact Paul Johnson at 419.321.1006.

For more information, contact Fred Treuhaft at 419.842.6116.
Eliza Browning

For more information about the firm, contact David Waterman, Chairman of our Management Committee, at 419.321.1212.
Here’s our creative program from the celebration featuring all members at the time. If you want to be a part of our family tree, e-mail us and we’ll tell you more about membership benefits.
Upcoming Events

**Making Wellness Work – Leading Change and Engagement Within Your Workforce**

February 12, 7:30 a.m., UT’s Main Campus (members-only)

Workplace wellness programs are becoming more widespread, and with good reason. Healthy employees tend to be happier and more productive employees. A team from Paramount Health Care and ProMedica Wellness will give you affordable, doable ideas and resources to help you begin implementing workplace wellness.

**Coyle Funeral Home Case Study on Succession and Transition Planning**

March 12, 11:30 a.m., Coyle Funeral Home (members-only)

The story you’ve been dying to hear. Joe Coyle and Meghan Coyle-Stamos talk about their recent transition of leadership from Joe to daughter Meghan. The presentation will begin at 11:30 with an optional behind-the-scenes tour of Coyle Funeral Home to follow. A boxed lunch and lots of puns will be provided.

**How the Best Differ From the Rest: Building Businesses That Learn, Lead and Last**

April 23, 5:30 p.m., The Toledo Club (open to the public); co-sponsored by UT College of Business and Innovation Alumni Affiliate

Gary Harpst with Six Disciplines will discuss which best practices correlate with financial performance by reviewing the seven practices that top performers get right and where bottom performers go wrong. His worst performers list is a pointed discussion of the crazy things we do as leaders. Last of all, Gary will suggest how to figure out where to start if you want to move from the middle of the pack to top performer ranks.

**KeyBank Global Leaders Forum, Leading Change in a Chaotic Environment.**

As part of the College of Business and Innovation, our members are privy to many of the events hosted by the College. There’s still time to register for KeyBank Global Leaders Forum, Leading Change in a Chaotic Environment on Feb 1
Click on the links to RSVP.

**Fall Events**

Since the last issue, the Center hosted two mini-forums for members-only. If you missed them or want to view them again, visit our Website and go to our "members-only" section. Please e-mail us if you need the log-in information.

*Tips for Planning After the Election:* Cathy Sheets and a team from Plante Moran’s Wealth Management Group spoke on how the election results will impact future tax and investment laws. They provided a lot of useful information and the crowd and fantastic questions.
Reaching Beyond – Finding New and Creative Funding Sources: Where could a company with just a few million dollars in sales go for money to grow? Candace Klein from SoMoLend talked about the latest trend of crowdfunding. The above photo of her is taken from an article in the Jan. 6 issue of the New York Times. Also in this mini-forum, Ben Trumbull with Savage Consulting and Toby Mill with Tranztec shared a local case study on spinning off a product; and Bren Cousino spoke about funding and investment opportunities with Innovation Enterprises at The University of Toledo.

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.

Welcome new members!
The Center would like to welcome our newest members:
- Buck Brothers
- Dundee Manufacturing Company
- Mel Lanzer Company
- Pioneer Industrial Systems
- Pride Gage
If you know of any family, or privately-held business that would benefit from membership in the Center, please invite them to attend an event as our guest.

**Sponsors Series**

This fall we kicked off our new series, *What You Need to Know Now*, consisting of short, 8-10 minute videos on current business topics utilizing the expertise of our sponsors. We’ve received positive feedback and appreciation for the to-the-point information on timely material topics. We hope to add a few more to our library soon. Please e-mail us any topics or trends you’d like us to explore, and we’ll find an expert to talk about it! Click here to see what videos are in our current library. This is a member-only feature — e-mail us if you need your login information.

---

**Welcome New Advisory Board Members**

These movers and shakers are working to take the Center to the next level!
Already the good ideas are flowing!

Chris Anderson, Anderson Strategy
Bashar Gammoh, UT Assistant Professor of Marketing
Gary Johnson, American Flooring Installers
Donald Levitt, Levitt Consulting
Ed Simon, Giant Industries

And while we miss working so closely with Mark Meyer of Shrader Tire & Oil, we’re excited for our new leadership with Joe Feudi of Caputo & Associates chair and Tobey Cauffiel of Granite City Pickling as vice-chair.

Visit our Website for a complete list of our advisory board.

---

**Business Insights from Our Sponsors**

2012 American Taxpayer Relief Act Increases Tax Rates, But Also Extends Numerous Tax Breaks  
by Gilmore, Jasion and Mahler

The recently enacted 2012 American Taxpayer Relief Act is a sweeping tax package that includes, among many other items, permanent extension of the Bush-era tax cuts for most taxpayers, revised tax rates on ordinary and capital gain income for high-income individuals, modification of the estate tax, permanent relief from the AMT for individual taxpayers, limits on the deduct and exemptions of high-income individuals, and a host of retroactively resuscitated and extended tax breaks for individual and businesses.

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

---

To opt-out of this e-mail click [here](#).

Please note: Opting out of this e-mail update does not preclude you from receiving other important e-mails from The University of Toledo.