

# **Entrepreneurial Institute**

## **Background**

Dr. Saltzman has helped conduct over 40 Entrepreneurial Institutes involving over 400 families. The National Grocers Association (N.G.A.), together with Nicolas J. D'Agostino, Jr., chairman and CEO of D'Agostino's Supermarkets, New York, and the late Stan Silversweig, former president of Silversweig Associates management consulting firm, which specialized in improving corporate and family business cultures, identified the need for family-owned businesses to implement long-term organizational development and financial planning strategies, as well as to gain vital insights into psychological issues relating to self-development, interpersonal relationships, and team-building in a family business culture. As such, the N.G.A. Entrepreneurial Institute was born and we are pleased to bring to you an intensive course of study in which you will learn to develop, improve, and perfect your abilities to plan for the future.

## **Seminar Purpose**

The Institute is now a three-day program event emphasizing business planning, succession/organizational planning, and estate and financial planning. Attendees will also learn how to create and develop an entrepreneurial will. Overall, the Institute is designed as an interactive learning experience to include opportunities for ongoing networking and communication among participants. Support materials include, workbooks, Myers Briggs Manual and Testing

Instruments, and various handouts provided by faculty members so that the participants can successfully implement their plans when they return to their business. This forum offers unique opportunities for family and non-family members to address issues that are crucial to the future success of the business and family.

Day 1	
8:00 a.m. - 8:30 a.m.	Continental Breakfast
8:30 a.m. - 8:45 a.m.	Welcome to the Institute <b>"The Power of Entrepreneurs and Objectives of Program"</b> -Nick D'Agostino
8:45 a.m. - 9:00 a.m.	<b>Overview of the Institute Support Materials and Logistics for the Institute</b> -Frank DiPasquale
9:00 a.m. - 9:30 a.m.	<b>"Hints for Improving Communication"</b> -Glenn Saltzman
9:30 a.m. - 9:45 a.m.	Break
9:45 a.m. - 11:00 a.m.	<b>Strategic Planning: "Planning for Your Company's Viability Today and Tomorrow"</b> -Nick D'Agostino
11:00 a.m. - Noon	<b>"Involving Others in the Process, Using the Plan"</b> -Nick D'Agostino
Noon - 1:00 p.m.	Lunch
1:00 p.m. - 1:30 p.m.	<b>Development/Improvement of Your Own Strategic Plan</b> -Family Groups
1:30 p.m. - 4:00 p.m.	<b>"Assessing your own personality style as it effects your leadership skills and understanding of others"</b> -Glenn Saltzman
4:00 p.m. - 5:00 p.m.	<b>Families meet with Dr. Saltzman or work on their strategic plans with faculty assistance</b> -Glenn Saltzman
5:00 p.m. - 5:30 p.m.	<b>Putting Together Your Own Plan</b> (Family Groups)
7:00 p.m. - 9:00 p.m.	Dinner on your own
9:00 p.m.	<b>Hospitality Suite and Informal Discussions</b>

<b>Day 2</b>	
8:00 a.m. - 8:30 a.m.	Continental Breakfast
8:30 a.m. - 10:45 a.m.	<b>"Company Culture and Developing Your Management Team"</b> -Frank DiPasquale & Fred Martels
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - 11:45 a.m.	<b>"Succession Planning"</b> -Nick D'Agostino
11:45 a.m. - 12:30 p.m.	<b>Develop Your Own Plan</b> (Family Groups)
12:30 p.m. - 1:30 p.m.	Lunch
1:30 p.m. - 2:00 p.m.	<b>"Pitfalls to Planning"</b> -Glenn Saltzman
2:00 p.m. - 3:00 p.m.	<b>Elements of Estate Planning: "The Importance of Estate Planning and Developing the Entrepreneurial Will"</b> -Tom Wenning
3:00 p.m. - 4:00 p.m.	<b>"What Are Your Plans for Establishing Equity and Control?" (Owners and Spouse)</b> -Jim Kirlin
4:00 p.m. - 4:15 p.m.	Break
4:15 p.m. - 5:00 p.m.	<b>Re-Examine Your Strategies and Develop an Action Plan</b> (Next Generation Group)
6:30 p.m. - 8:00 p.m.	Reception and Dinner
8:00 p.m.	<b>Hospitality Suite and Informal Discussions</b>
<b>Day 3</b>	
8:00 a.m. - 8:30 a.m.	Continental Breakfast
8:30 a.m. - 9:00 a.m.	<b>"Taking the Institute Home: Making It Work"</b> -Nick D'Agostino
9:00 a.m. - 10:00 a.m.	<b>Developing a 45-Day Plan</b> (Family Groups)
10:00 a.m. - 10:15 a.m.	Break
10:15 a.m. - 11:15 a.m.	<b>"Work, Friends, and Love - The Crucial Balance"</b> -Glenn Saltzman
11:15 a.m. - 11:45 a.m.	<b>Closing Questions and Answers; Graduation</b>

For more information regarding Entrepreneurial Institute workshop dates, costs and registration contact their website at: <http://www.nationalgrocers.org/>