

# BERKS FAMILY BUSINESS ALLIANCE

## Impact Report

### OUR MISSION

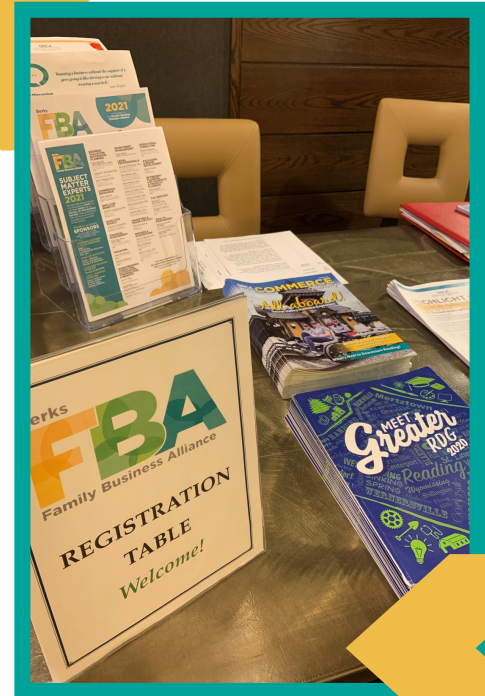
To provide resources and support for family businesses in Berks County through diverse programming and numerous interactive opportunities.

### ESSENTIAL CONVERSATIONS

Family businesses need development just as a non-family business, but with an added layer of understanding family dynamics.

Topics discussed include:

- SUCCESSION PLANNING
- GOVERNANCE
- HUMAN RESOURCES
- MARKETING & BRAND DEVELOPMENT
- STRATEGIC TALENT MANAGEMENT
- FINANCIAL PERFORMANCE
- LEADERSHIP VS MANAGEMENT
- FAMILY ADVISORY BOARDS
- TECHNOLOGY
- INTERNAL COMMUNICATION
- PERFORMANCE MANAGEMENT



Jim Boscov, Keynote Speaker  
Fall Forum Nov. 2021

## EVENTS FOR SUCCESS

### Summer Symposium

- It's My Company...Why Can't I Do What I Want With My Money? **Pay Equity** in Family Business with Mosteller & Associates

### Workshops & Networking

- You Will One Day Be Gone. **Estate Planning Panel** with RKL, Truist, Kozloff Stoudt Attorneys, The Stevens & Lee Companies, and Wilmington Trust / M&T Bank Emerald Advisory Services
- **Cybersecurity Basics** with Weidenhammer
- **Cocuzza Property Tour** - Exclusive look inside West Reading Motor Club followed by a cocktail event at Say Cheese

### Fall Forum

- A Candid Conversation with **Jim Boscov**
- Mr. Boscov shared a never-before-heard story of his past including growing up with his father, leaving the family business to branch out on his own, and then coming back to the business.
- He also shared the changes necessary during the COVID19 pandemic & how his company stayed resilient, while keeping his employees happy.

## NEW PARTNERSHIPS

### The High Center for Family Business

- Offering an expanded set of resources available for businesses who are looking to spend more time "on" the business than "in" the business.
- Providing the next level of resources and events for companies who are scaling (\$3M+).



## PEER GROUP GROWTH

Monthly discussion groups professionally facilitated by one of our sponsor professionals. This confidential setting allows members to "vent" issues but most importantly learn to solve problems & address future concerns for their business. Meetings rotate from welcoming outside speakers on business topics to discussing issues occurring within their family businesses. Conversations are confidential and only one business member per industry per group.



**New for 2021 - Next Gen Group** for those prepped & rising to move into ownership.

**Laurie M. Peer CPA, CFP, CEPA, CPCC - RKL LLP**  
Partner, President

**Chet Mosteller - Mosteller & Associates**  
President

**Daniel Becker, Esq. - Kozloff Stoudt Attorneys**  
Managing Director

**Steve Essig - Essig Plumbing & Heating**  
President

**Travis A. Berger, Ph.D. - Alvernia University**  
Co-Chair, Business Department  
Assistant Professor of Business and Leadership

FACILITATORS



Jim Gerlach, GRCA CEO  
Fall Forum Nov. 2021

## 2021 SPONSORS

### Founding Partners & Major Sponsors

FORCEpkg  
Kozloff Stoudt Attorneys  
RKL, LLP  
Truist

### Signature Events Sponsor

The Stevens & Lee Companies

### Program Sponsor

Mosteller & Associates

### Family Champion Sponsors

Dolan Construction  
Orrstown Bank  
Paul W. Essig  
Redner's Markets, Inc.

## 2021 FBA COUNCIL

Paula Barrett	- RKL, LLP
Daniel Becker, Esq.	- Kozloff Stoudt Attorneys
Nick Bentley	- American Polarizers
Harry Ciavarella	- M&T Bank
Maureen Dolan	- Dolan Construction
Steve Essig	- Essig Plumbing & Heating
Chester Mosteller	- Herbein I Mosteller HR Solutions
Tom Newmaster	- FORCEpkg
Karen Norheim	- American Crane & Equipment Company
Dave Roland	- Truist
Don Schalk	- O'Pake Center at Alvernia
Jay Wagner	- The Stevens & Lee Companies

## OUR REACH

**900+** Enewsletter  
**22** Peer Groups Members  
**23** Peer Groups Businesses

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**CONTACT & GET INVOLVED**