



Succeeding in Succession: Assess Your Personal and Business Readiness
Donald Bielen - The Rainier Group

Wednesday, October 8, 2014
Rogue Valley Country Club, Medford OR

Background

Family business ownership transition and operational succession requires a delicate balance between personal, family and business requirements and objectives. This interactive session will assess your business transition and succession “readiness” and identify how best to increase the likelihood of meeting your personal requirements, preserving the family’s wealth and maintaining the key relationships. We will share and discuss in detail the top 10 Personal and 10 Business “Readiness Indicators”, based on 30 years of experience with family business. You will take away a set of best practices that you can apply to your situation to craft a defined roadmap with the essential elements to achieve a successful transition.

More Information

[Wealth in Families](#) (2006), Second Addition, Charles W. Collier, Harvard University

[The Keys to Family Business Success](#) (2011), Leslie Dashew, Sam Lane, Joe Paul, Darrell Beck and William Roberts, Aspen Family Business Group

[Preparing Heirs](#) (2010), Roy Williams and Victor Preisser, Institute for Preparing Heirs

[Managing by Values](#) (2003), Dr. Michael O’Connor, Ken Blanchard

[Perpetuating the Family Business](#) (2004), John L. Ward, Palgrave Macmillan, New York

[Family Wealth Transition Planning: Advising Families with Small Businesses](#) (2009), Hartley and Griffith, Bloomberg Press, New York

Austin Family Business Program Resources

Advisor Search listing of experienced family business professionals:
<http://business.oregonstate.edu/familybusinessonline/advisor-search>

The companion podcast episode for this session will be available in the Education/Family Business 360 section on iTunes University as well as the AFBP website.

Join the Austin Family Business Program LinkedIn group to stay up to date on upcoming events and programming. The group can be found at <http://www.linkedin.com/groups/Austin-Family-Business-Program-5188170>

Presenter: Donald L. Bielen, MBA, CFP® Director of Business Advisory Services, The Rainier Group

Donald specializes in Ownership Transitions, Business Succession and Wealth Management for successful business owners and affluent individuals. Since 1992, Don has successfully completed in excess of 100 business transition and succession plans for clients throughout the United States. He works closely with Rainier Group clients and technical staff to provide direction and consultation to design and implement advanced planning strategies. Don, as the Director of Business Advisory services and shareholder, provides consulting leadership and directs Rainier's sales and marketing strategies. He is recognized by his clients, colleagues and professionals as a trusted, knowledgeable, organized and creative individual.

Donald received a Masters degree in Business Administration (MBA) from the University of Oregon and holds a CFP® designation as a Certified Financial Planner™ practitioner. He received a Bachelors of Science (B.S) degree in Business Finance and a minor in Economics from the University of Montana. He is also a graduate from the College for Financial Planning in Denver, Colorado. He maintains a General Securities license and a Series 6, 65 and 63 securities licenses.

Donald serves on the Board of Directors for a regional oil distribution company and is the Advisory to the board for local lumber company. He is the President of the Forest Heights HOA. He is a Committee Chair and active member with the Association for Corporate Growth (ACG). He frequently volunteers time to various non-profit and charitable organizations throughout Portland. Prior to joining the Rainier Group, Don held positions as an Operations Manager for Allstate Insurance Company's Regional Operations Center, Assistant Manager for Montana Merchandising, and was a Grain Merchandiser for the Columbia Grain Company.

Marc Nelson CEO, Marc Nelson Oil Products

Marc Nelson Oil Products (MNOP) has been meeting the petroleum needs of customers since its founding by Melford M. Nelson in 1936. Over the past 77 years, MNOP has become one of the largest and most admired petroleum and heating oil distributors in Oregon. Marc Nelson, CEO, joined his father in 1962 and over the past 5 years Marc has been transitioning the business and commercial real estate to his son, Peter Nelson, President and daughter, Molly Sigado, Vice President. Marc Nelson will join us to share his experiences and lessons learned from the family business transition process of this third generation business.