



Choosing and Cultivating the Right Team to Transition Your Business

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Background

Behind most successful family business transitions is a team of trusted advisors and leaders committed to guiding and supporting the family through the process. But how does a family business go about deciding what types of teams are needed, and choosing the right members for each team?

Depending on the complexity and stage of the transition planning process of your family business you may need to hire a team of outside professional advisors, develop or hire leaders for the business, or put together a board of directors or advisors. Today we will hear from Jay Haladay; a business leader that has journeyed through the lifecycle of a successful family business, from founding the company to business transition and retirement. He will share his perspectives on putting together teams that supported the transition of his family enterprise. He will also share how he prepared his sons for roles within the business.

More Information

[How to Choose and Use Advisors: Getting the Best Professional Family Business Advice](#) (2010) Craig Aronoff & John Ward, Palgrave Macmillan

[Building a Successful Family Business Board: A Guide for Leaders, Directors, and Families](#) (2011). Jennifer Pendergast et al, Palgrave Macmillan

[More than Family: Non-Family Executives in the Family Business](#) (2010) Craig Aronoff & John Ward, Palgrave Macmillan

[The Legacy Family: The Definitive Guide to Creating a Successful Multigenerational Family](#) (2009) Hausner, L. and Freeman, D.K. New York, Palgrave MacMillan.

[The Keys to Family Business Success](#) (2011) Leslie Dashew et al, Aspen Family Business Group

Austin Family Business Program Resources

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

Social Media

Facebook at: <https://www.facebook.com/familybusinessonline>

LinkedIn at: <http://www.linkedin.com/groups/Austin-Family-Business-Program-5188170>

Audio Podcasts: <http://business.oregonstate.edu/familybusinessonline/podcasts>

Presenter: Donald Krahmer – Shareholder, Schwabe, Williamson & Wyatt

Don Krahmer, Jr. serves as co-chair of the Technology and Business practice. He is a corporate lawyer, shareholder member of Schwabe, Williamson & Wyatt's business practice group. Mr. Krahmer is highly respected by Northwest businesses, investors and entrepreneurs for his knowledge and experience in corporate and securities law, with special emphasis on growth and technology companies. He represents a wide-range of public corporations, closely-held businesses, venture capital firms and individuals in business formations, business transitions, corporate finance including debt and equity offerings (public and private), partnerships, securities compliance, officer and director liability, formation of foreign subsidiaries, contract negotiations and other business matters.

Mr. Krahmer also specializes in mergers and acquisitions, with particular knowledge in structuring and implementing mergers and acquisitions, joint ventures, strategic alliances, restructurings, divestitures and leveraged buyouts for private investors, equity and venture capital investment firms and public and privately-held corporations. He maintains a broad network of relationships with local and regional investment banking, equity investment, and venture capital firms, and local and regional angel investors, and has successfully worked with corporate leaders in identifying opportunities to meet their strategic business objectives.

Presenter: Matthew Bisturis – Shareholder, Schwabe, Williamson & Wyatt

Matthew Bisturis joined Schwabe, Williamson & Wyatt in 2007. He focuses his practice in the areas of business and real estate transactions, including choice of entity and entity formations, business transition and succession planning, mergers and acquisitions, real estate acquisitions and dispositions, commercial leases, and general corporate and real estate matters. Mr. Bisturis works with private and public entities, nonprofit corporations and individuals in all aspects of business and real estate transactions.

Mr. Bisturis is a member of Schwabe's Business Transitions Group – a multidisciplinary team of attorneys who show business owners how to create personal value by using legal strategies to maximize, capture, and keep the illiquid wealth that has been built in their closely-held businesses. Prior to joining Schwabe, Mr. Bisturis clerked for the Oregon Department of Justice, clerked as an extern in the legal department at Mentor Graphics Corp., and worked as a business analyst at the Boeing Company.

Jay Haladay – CEO (retired), Viewpoint Construction Software

Jay attained a BA in Economics and an MBA from UCLA before joining IBM in 1974, where he held a number of sales and management assignments in Los Angeles and Virginia during his 10 year career with IBM. Digital Systems capitalized on his talents by naming him President in 1984, evolved into a division of Convergent Technologies and later part of Convergent Business Systems, a Unisys subsidiary. Jay led these organizations before forming Coaxis to purchase them from Unisys in 1990.

Jay's association with the construction software market dates back to 1983. As a consistent innovator in applying leading-edge technologies to address the industry's unique business problems, Jay is often sought as a subject matter expert for trade and industry organizations, and was recently awarded Technology Executive of the Year 2013, by the Technology Association of Oregon. Jay was able to pull together his many experiences in the development of RiverEast Center, a Gold LEED Certified building that serves as the Portland, Oregon headquarters for Viewpoint Construction Software.