

Attachment A – Family Business 360 Proposal Questions

Proposal Content

If you would like to propose more than one unique session, fill out an additional program content section for each. Proposing multiple sessions does not guarantee you will be selected to deliver all of your proposed programs; the selection committee may select one or more of your proposed sessions for the program year.

We strongly encourage respondents to gain approval and commitment from the family business client that will be part of the presentation at the time you return your proposal.

Proposal Questions and Outline

Answers to the following questions are required for all proposals. Please follow this outline if you decide to submit via email or postal mail. Responses should be clear and concise but convey the necessary information.

Contact Information

- Name, Title, Organization
- Address, City, State, Zip
- Phone
- Email
- Website
- If you will be presenting with an additional advisor or advisors, please provide their names, titles, and organizations.

Professional Information

- What is your area of expertise?
- How many years of professional advising experience do you have?
- Approximately what percentage of your client base are multi-generational family businesses?
- Please list any professional credentials you hold, and associations to which you belong.
- Please describe your experience working with family companies and presenting educational materials. Please be as specific as possible.
- If applicable, please provide a reference for one of your past presentations.
- Optional: Is there any other information you would like to share about yourself for our consideration?

Proposed Program Content (Up to three unique proposals are allowed)

- Select any dates and locations for which you would be interested and available to deliver your presentation (review the RFP for a complete listing and associated fees). If selected, the AFBP will work with you to finalize one date and time for your presentation.
- Which family business topic will your presentation address?
- Provide the overall thesis of your presentation, a brief description of the content, and how you plan to convey the material.
- What actionable tools or information would an attendee gain from your presentation that they could use right away to help prevent or reduce this particular challenge?
- Which of your family business owner clients will participate in the program?
 - Have you contacted them to confirm their willingness to participate?