The Family Business Stewardship Institute prepares family business owners, shareholders, and stakeholders (including non-owner spouses and future owners) for effective stewardship of their family enterprise and for the significant and sometimes unpredictable transitions and decisions that must be made to determine the success and continuity of the family business.

**WHO THE CLASS IS FOR**

Family business owners, shareholders, and stakeholders (including non-owner spouses and future owners) looking for ways to ensure effective stewardship of their family enterprise.

**WHY YOU SHOULD JOIN**

No other program out there offers this level of comprehensive family business education. Thought leaders, subject matter experts, and live case studies, along with confidential peer-to-peer learning, will help you develop a set of tools and resources to foster responsible and effective stewardship.

**WHAT YOU’LL LEARN**

The program’s comprehensive curriculum focuses on six key areas and how each plays a vital role in the health and success of your family business. You’re encouraged to apply what you learn in the classroom to your own business, measure the impact, and share the results with your peers.

**YOUR COMMUNITY**

Each class is a melting pot of family business CEOs, shareholders, family council members, non-family business employees, and managers. This trusted and confidential group will support you on your journey and help develop a family strategy for responsible ownership. Many participants stay in touch with each other after graduation.

**JOIN THE NEXT CLASS**

The Stewardship Institute kicks off every September.

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FAMIL Y BUSINESS STEWARDSHIP INSTITUTE

FAMILY BUSINESS CENTER

LOYOLA UNIVERSITY CHICAGO

THE KEYS TO RESPONSIBLE STEWARDSHIP

18 Month Course
Quarterly Facilitated Meetings on Loyola’s Water Tower Campus
Experiential Learning
Comprehensive Curriculum with Peer Support
Taught by Expert Faculty
Immersive Classroom Environment
Guest Speakers and Subject Matter Experts
Live Case Studies

**PROGRAM DETAILS**

**CURRICULUM**

**Unit 1 • Managing Relationships**
- Understanding Yourself and Others
- Life Stages
- Family Dynamics and Genograms
- Difficult Conversations
- Family Cohesion
- Conflict and Conflict Resolution

**Unit 2 • Governance**
- Business and Ownership Governance
- Leadership and Accountability
- Implicit to Explicit Governance
- Models of Family Governance
- Creating a Governance Plan

**Unit 3 • Leadership**
- Defining Leadership
- Vision and Values
- Responsible Leadership
- Leadership and Team
- Managing Change
- Creating Accountability

**Unit 4 • Finance**
- Accounting and Financial Analysis
- Planning and Investments
- Business Exit Strategies

**Unit 5 • Strategy**
- Strategy Basics
- Risk and Resiliency
- Family Strategy
- Business Strategy
- Personal Strategy

**Unit 6 • Transitions**
- Keys to Transitions
- How Will You Measure Your Life
- Gratitude
- Defining Personal Success
- Working with Advisors

"FBSI has the ability to be transformative for participants. I personally felt the program strengthened my ability to help my family – and the structures already in place – grow and prepare for a healthy future together."

-Joe Edison
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