

Welcome to the first issue of the Hartley Group newsletter!

Bonnie and Mike would like to hear from you. What do you like about this newsletter? How can we improve it?

Contact us at Info@TheHartleyGroup.org.

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The Family Business Crisis You've Overlooked

You may have overlooked a crisis that could wreak havoc on a family business run by you or your client.

When a relative dies or is stricken with a catastrophic illness, the family business feels the impact--even if that family member never worked for the company. Just as the business must prepare for the absence of the leader, it must also prepare for the loss or illness of others in the family.

Learn how to prepare for this contingency in Bonnie Brown Hartley's "[Leaving our house in order](#)," published in *Family Business Magazine* (Winter 2008).

Meet Us at the Family Firm Institute Annual Conference!

Bonnie is looking forward to the Family Firm Institute's annual conference, for which she's co-chairing the Program Committee.

Exciting keynote speakers will include:

- **Steven Johnson, author of *The Ghost Map***, on the nature of competition from the perspective of science, technology and the media

The Hartley Group Bios



Bonnie Brown Hartley, Ph.D., is President of Transition Dynamics Inc., a consulting firm specializing in business family and organizational transitions.



Michael T. Hartley, CFP®, AAMS, is the Chairman and Chief Executive Officer of Dale K. Ehrhart, Inc. and a manager of Tillman Hartley LLC.

- **John Micklethwaite, Editor-in-Chief of *The Economist***, on the competitive potential of globalization
- **Thierry Peugeot, Chairman of the Supervisory Board of PSA Peugeot Citroen SA**, on competition in the global automotive business
- **Margaret Heffernan, author of *The Naked Truth: A Working Woman's Manifesto about Business and What Really Matters***, on the role of women as competitors and contenders in family enterprise

The conference will run October 29-31. Read the [conference brochure](#).

If you plan to attend, drop us an email, so we can look for you.

Family Foundations and the Attorneys for Family Held Enterprise Annual Conference

Emerging developments changing the nature of family foundations include:

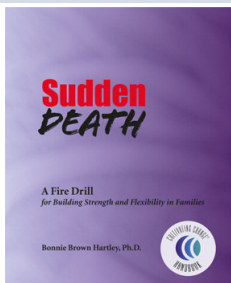
- Program related investments (PRIs)
- Mission related investments (MRIs) that meet distribution requirements
- Venture philanthropy
- Legal alternatives to private foundations

This is just one of the topics addressed by Bonnie and Mike when they spoke on "Transitions in Family Foundations: Integrating Leadership Succession into Foundation Governance" at the [International Association for Attorneys for Family Held Enterprise](#) Annual Conference in San Antonio, Tex. on April 2, 2008.

You'll learn more about family foundations in the next issue of the Hartley Group Newsletter.

From the Hartley Group's Cambio Press

Sudden Death: A Fire Drill for Building Strength and Flexibility in Families



Think how good you would feel if you could spare your clients some of the negative consequences of an unexpected death.

Sudden Death: A Fire Drill for Building Strength and Flexibility in Families provides the tools your clients need to start difficult, yet necessary, discussions about a death in the family. Nobody likes to think about their own death or the death of a loved one. But a sudden death can devastate those who are left behind.

You can't bring the person back to life. But with the right preparation, you can ensure that their personal legacy is passed along and that the necessary



Michael W. Hartley, CFP®, is Director of DKE Digital Resources, which provides service platforms to multi-generational families and their professionals.

Quick Links to the Hartley Group

- [Cambio Press](#)
- [DKE Digital Resources](#)
- [Transition Dynamics Inc.](#)

Join Our Mailing List!

If you're in Boston...

Learn "[Five Solutions for Mixing Finance, Families and Fiduciaries](#)," when

Bonnie Brown Hartley presents to the Boston Estate Planning Council on Thursday, November 6.

Mike Hartley to teach in FFI Certificate Program

The Family Firm Institute has asked Mike Hartley to teach about finance in its Family Business Advising Certificate Program. We'll

information is easily accessible by the survivors.

Sudden Death helps families by posing questions such as:

- If you died tomorrow, what would your survivors need to do first? During the next six months? During the two years after your death?
- What would they need to know about your personal and professional life, so they could handle the issues arising around money, power and love?
- What would your legacy be? How would your loved ones remember you?

Don't let your clients get caught unprepared. Order *Sudden Death* now! Call Michael W. Hartley at 941.485.8220 or [order it from our website](#).

announce details of his April class in our next newsletter.

**Save
10%**

Save 10% when you order 10 or more copies of *Sudden Death: A Fire Drill for Building Strength and Flexibility in Families* to share with your clients. You must order directly from Cambio Press to receive this discount. Just call Michael W. Hartley at 941.485.8220 or [order your books from our website](#) using the promotional code HartleyFall2008.

Please feel free to forward this coupon to a colleague.

Promotional code: HartleyFall2008

Offer Expires: December 31, 2008

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Hartley Group | 101 West Venice Avenue, Suite 10 | Venice | FL | 34285

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