Aspen Family Business Group

Family Meetings: Getting Started

Family meetings provide a structured environment for learning and for conversation. Guidelines and topics will evolve based on circumstances and needs.

Establish a framework or charter

- Why do we want to meet and what do we want to accomplish (big picture)?
- Who will participate?
- How often and where will we meet?
- Who will lead the process? Do we want to hire a facilitator?

Guidelines for meetings

- Establish ground rules or norms for communication and behavior.
- How will we make decisions – majority vote, unanimous, consensus?
- How will we communicate in between meetings, and to other stakeholders?

Content and topics for meetings (examples)

- Develop a shared vision.
- Get updates on the business.
- Learn about family business dynamics, roles and boundaries.
- Engage in personal and group skill development.
- Educate and prepare the rising generation.
- Have fun!

Empowering family businesses of all sizes

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