

PRICE CENTER

ENTREPRENEURSHIP & INNOVATION



# THE STEINBECK FAMILY BUSINESS SEMINAR CREATING A BETTER FUTURE

FRIDAY, MAY 18, 2018 | SATURDAY, MAY 19, 2018  
UCLA ANDERSON SCHOOL OF MANAGEMENT

**UCLAAnderson**  
SCHOOL of MANAGEMENT

# The Steinbeck Family Business Seminar

## >> SCHEDULE – FRIDAY, MAY 18, 2018

8:30 – 9:00 a.m. REGISTRATION AND BREAKFAST *C Atrium, Entrepreneurs Hall*

9:00 – 9:15 a.m. **WELCOME** *A202, Collins Center*

**Alfred E. Osborne, Jr.** | Senior Associate Dean and Professor, UCLA Anderson School of Management  
**Elaine Hagan ('91)** | Executive Director, Harold and Pauline Price Center for Entrepreneurship & Innovation  
**Holly Han ('02)** | Director, Steinbeck Family Business Seminar, UCLA Anderson School of Management

9:15 – 9:45 a.m. **THE IMPORTANCE OF FAMILY BUSINESS** *A202, Collins Center*

**Jay Steinbeck ('66)**

We support the growth and sustainability of multi-generational family business through experiential learning and networking.

9:45 – 10:30 a.m. **FAMILY BUSINESS INTRODUCTIONS** *A202, Collins Center*

10:30 – 10:45 a.m. BREAK

10:45 – 11:45 a.m. **CASE AND DISCUSSION: SUCCESSFUL FAMILY TRANSITIONS** *A202, Collins Center*

**Nicole Vermeer** | Chair, Vermeer Corporation Family Council; Shareholder Governance, Vermeer Corporation;  
Co-Founder, Social Capital Philanthropists; Director of Advancement, UCLA Ziman Center for Real Estate

Less than one-third of family businesses survive the transition from first- to second-generation ownership. Another 50 percent don't survive the transition from the second to the third generation, and the odds are even worse for the third generation. However, careful planning can mitigate this risk. Founded in 1943 by Gary Vermeer, Vermeer Corporation has 100 owners and is a manufacturer of industrial and agricultural equipment in over 60 countries. Nicole Vermeer will cover several transition issues: succession from the second-generation CEO to third-generation CEO, strategies to maximize corporate longevity and managing the Ownership Council versus the Family Council (shareholder engagement).

11:45 a.m. – 12:15 p.m. **EXPERT PANEL** *A202, Collins Center*

Our experts from AllianceBernstein Investments, Bolton & Company, Business Consulting Resources, City National Bank and KPMG will answer your questions regarding professional resources for closely held businesses.

12:15 – 1:15 p.m. LUNCH *C Atrium, Entrepreneurs Hall*

1:15 – 2:30 p.m. **KEYNOTE ADDRESS: ADAPTATION IS ESSENTIAL** *A202, Collins Center*

**Marc Canter** | Co-Owner, Canter's Deli

**Alex Canter** | Co-Owner, Canter's Deli; Founder and CEO, Ordermark

Moderated by **Alfred E. Osborne Jr.** | Senior Associate Dean and Professor, UCLA Anderson School of Management

Canter's Deli was started by Alex Canter's great-grandfather in 1931. Alex's father, Marc, has been the backbone of the restaurant for the last 35-plus years. On call 24/7, Marc has ensured that the deli survived through many ups and downs. In the past few years, many delis have shut down, but Canter's has thrived by adopting new technology. Alex, who started waiting tables when he was 14, looked into upgrading certain aspects of the business, including redesigning the menu, installing new point-of-sale systems and creating a mobile-friendly website. Canter's was managing 12 different online ordering platforms, each requiring its own tablet and/or printer, so Alex founded Ordermark to provide online ordering management for restaurants so they can optimize their online ordering potential and increase sales by receiving all of their online orders on one device.

2:30 – 2:45 p.m. BREAK

2:45 – 5:30 p.m. **DISCUSSION: TAX PLANNING** *A202, Collins Center*

**Gonzalo Freixes** | Adjunct Professor and Associate Dean for the Fully Employed MBA Program, UCLA Anderson School of Management

At the end of last year, the Tax Cuts and Jobs Act of 2017 was signed into law. The Act made significant changes to the U.S. taxation of individuals, corporations, small businesses, real estate investors, estates and international transactions. Among the changes were increases to the federal estate, gift and generation-skipping transfer tax exemption amounts. What do these changes mean to family business owners? This session will provide an overview of the changes to the tax laws and offer tips that may shape your future tax planning strategies.

5:30 – 6:30 p.m. RECEPTION *C Atrium, Entrepreneurs Hall*

# The Steinbeck Family Business Seminar

## > SCHEDULE - SATURDAY, MAY 19, 2018

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8:30 – 9:00 a.m.      **BREAKFAST**      *C Atrium, Entrepreneurs Hall*

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9:00 – 10:45 a.m.      **DISCUSSION: LONG-TERM SUSTAINABILITY FOR THE FAMILY BUSINESS**      *C301, Entrepreneurs Hall*  
**Alfred E. Osborne, Jr.** | Senior Associate Dean and Professor, UCLA Anderson School of Management

Osborne will discuss strategies for sustaining and growing the family business. How do owners think strategically about Blue Ocean Strategies to create sustainable growth to satisfy the family's needs? This session will present strategies for capturing new markets and customers and eliminating competition to improve the chances of economic success for the family.

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10:45 – 11:00 a.m.      **BREAK**

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11:00 a.m. – 12:00 p.m.      **DISCUSSION: UPDATE ON THE REAL ESTATE MARKET**      *C301, Entrepreneurs Hall*  
**Eric Sussman** | Adjunct Professor of Accounting, UCLA Anderson School of Management

Family-owned businesses can be strongly impacted by real estate because it can be the most valuable asset passed down through generations. Professor Sussman will cover current trends and regulations that affect the market and discuss if we've hit the top.

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12:00 – 12:30 p.m.      **EXPERT PANEL**      *C301, Entrepreneurs Hall*  
Our experts from AllianceBernstein Investments, Bolton & Company, Business Consulting Resources, City National Bank and KPMG will answer your questions regarding professional resources for closely held businesses.

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12:30 – 1:30 p.m.      **LUNCH**      *C Atrium, Entrepreneurs Hall*

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1:30 – 2:45 p.m.      **KEYNOTE ADDRESS: CREATING A BETTER FUTURE**      *Room 118, Haines Hall*  
**Rod Roddenberry** | CEO, Roddenberry Entertainment  
Vice President, The Roddenberry Foundation; Founder, Roddenberry Adventures  
Moderated by **Holly Han ('02)** | Director, Steinbeck Family Business Seminar, UCLA Anderson School of Management

Growing up, Roddenberry was not familiar with Star Trek; he had never watched it. After his father Gene died, Rod began to explore Star Trek and produced *Trek Nation*, a documentary that chronicles his 10-year journey to explore his father's famous creation and how it affected others. The film led him to embrace the vision his father had for the future, and he created the Roddenberry Foundation in 2010. The Roddenberry Foundation built on his father's legacy and philosophy of inclusion, diversity, and respect for life to drive social change and meaningfully improve the lives of people around the world.

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2:45 – 3:00 p.m.      **BREAK**

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3:00 – 5:00 p.m.      **DISCUSSION AND ROLE PLAY: RESOLVING DISPUTES AND DEFUSING CONFLICTS**      *Room 118, Haines Hall*  
**Miguel Unzueta** | Associate Professor of Management and Organizations, UCLA Anderson School of Management

Resolving conflict within a family is very complex because the members have had a lifetime of interacting with one another. Their differences may have defined their interactions for years. A framework for defusing conflicts will be discussed and used to analyze workplace conflicts, which can carry over to the home. In this interactive session, participants will role-play a business dispute. Participants will learn to approach conflict proactively and resolve disputes. While disagreements can be frequent within a family business, they should be addressed immediately for the health of the business.

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5:00 – 5:30 p.m.      **CLOSING: NEXT STEPS FOR THE FAMILY**      *Room 118, Haines Hall*  
**Alfred E. Osborne, Jr.** | Senior Associate Dean and Professor, UCLA Anderson School of Management

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5:30 – 6:30 p.m.      **RECEPTION**      *C Atrium, Entrepreneurs Hall*

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## SPEAKER AND PANELIST BIOGRAPHIES

### SHIRIN N. BERJIS

Senior Manager, Tax, Economic & Valuation Services, KPMG LLP



Shirin Berjis is the senior manager of tax, economic and valuation services for KPMG. She has determined the fair value and fair market value of business enterprises in a broad range of industries, including aerospace and defense, gaming, life sciences, biotechnology, high technology,

pharmaceutical, asset management and waste management, among others. The securities valued included common stock, preferred stock, options, warrants and partnership interests.

Berjis has reviewed third-party valuation reports and analyses for financial and tax reporting purposes and has conducted numerous engagements involving the valuation of the following intangible assets: developed and in-process research and development technology; non-compete agreements, license agreements, patent portfolios and more. Prior to her current position at KPMG, Berjis was employed by the transaction advisory services valuation practice of Ernst & Young and as a certified public accountant with Crowe Horwath. She is also an accredited senior appraiser by the American Society of Appraisers and accredited in business valuation by the American Institute of Certified Public Accountants.

### ALEX CANTER

Co-Owner, Canter's Deli; Founder and CEO, Ordermark



Raised in the restaurant world, Alex Canter is the fourth-generation CEO of Canter's Deli, a historic Jewish deli located in the heart of Los Angeles. Canter's great-grandfather started the business in 1931, during the Great Depression. His family pushed the business forward during

the last 87 years and is working around the clock to keep it going strong for the next 87.

The deli staff watched Canter grow up until he began working side by side with them, waiting tables at just 14 years old. He has touched upon every other position since. With a Bachelor of Science in economics/entrepreneurship from University of Wisconsin-Madison, he was well-positioned when he created Ordermark in 2017. Canter was raised in the deli kitchen, and Ordermark was born there. Now serving hundreds of restaurants nationwide, Ordermark is revolutionizing the restaurant industry by helping restaurants grow profits with its innovative online ordering system.

Canter has spent thousands of hours researching and testing new ways to make online ordering successful, the result of which is that online ordering now accounts for over 30 percent of his family's business. Ordermark addresses a large and growing challenge for restaurants: online ordering services, which drive tremendous revenue to restaurants, each operate differently with their own technology and procedures for handling orders. This makes adding new online ordering services costly and difficult to effectively manage. Canter realized the key to a successful online ordering system is to simplify order management and analyze key performance metrics across all ordering platforms.

### MARC CANTER

Co-Owner, Canter's Deli



Marc Canter is an amateur photographer and the family member that helps run the legendary rock 'n' roll hangout, Canter's Deli, in Los Angeles, California.

### CHRISTOPHER J. CLARKSON, CFA

Director, Wealth Strategies Group, Bernstein Private Management



Christopher J. Clarkson is a senior vice president and a director of the wealth strategies group at Bernstein Private Wealth Management, a role he was appointed to in 2005. He has expertise in a variety of complex investment planning issues, including diversification planning for holders of

concentrated stock and option portfolios, retirement planning, multigenerational wealth transfer, philanthropy, advanced asset allocation and planning for the sale of a business. He is a frequent lecturer to groups of tax and legal professionals throughout the western United States. He has given educational seminars for the USC Tax Institute, Hawaii Tax Institute, Colorado Society of CPAs, Estate Planning Council of San Diego, Beverly Hills Bar Association, Hawaii Association of Public Accountants, Rocky Mountain Estate Planning Council, Seattle Children's Hospital Foundation and Silicon Valley Community Foundation. He joined the firm in 1995 and became a member of the wealth strategies group in 1998. He earned a B.A. with high honors in business/economics from the University of California, Santa Barbara, and is a CFA charterholder.

### AARON DYER

Senior Vice President, Business Banking Regional Manager, City National Bank



Aaron Dyer is a senior vice president and business banking regional manager with City National Bank's core banking team. Based in Los Angeles, he is responsible for developing and executing ongoing sales management strategic plans in order to drive key financial and sales objectives for his division.

Prior to joining City National, Dyer was a business banking manager at Citibank. He has more than 15 years of experience working in the financial services industry. He earned his bachelor's degree from Colorado Mesa University and his MBA from the University of Colorado at Boulder. He resides in Sherman Oaks with his wife, Anne, and two boys, Luke and Brady.

### GONZALO FREIXES

Associate Dean and Adjunct Professor of Accounting;  
Associate Dean, UCLA Anderson School of Management



A licensed attorney in California since 1979, Gonzalo Freixes came to UCLA Anderson in 1990 at the invitation of a colleague. Since joining UCLA Anderson, he has held positions as faculty director for the applied management research MBA field study program and as associate dean of the executive

MBA program as well as the global immersion program. In addition to his administrative duties, he teaches business law, international business law, business ethics, corporate and individual taxation and real estate law and taxation in the MBA program and in the undergraduate accounting minor.

What Freixes most enjoys is "being in the classroom and traveling the world with our students in our global programs." He has lectured in Brazil, Spain, France, Holland, Argentina, South Africa, Belgium and Chile on international business and tax subjects as well as on corporate governance, business ethics, international business law and trial advocacy. He has been faculty director of international seminars for executive MBA programs from other top business schools, including IE Business School (Madrid), ESSEC Business School (Paris) and Mannheim Business School (Mannheim, Germany).

For the last 18 years that Freixes has served as the faculty advisor and coach for UCLA Law's Mock Trial program, UCLA has won the national mock trial championship four times. He served on the board of trustees of the Executive MBA Council and was board chair in 2012. He was an elected official with the Newhall School board of trustees (serving two years as president) and also served three years on the State Bar of California's Commission on Judicial Nominees Evaluation, where he evaluated the California governor's judicial nominees for the Supreme, Appellate, Superior and Municipal courts.

## SPEAKER AND PANELIST BIOGRAPHIES

### KEN GILBERT

Co-Founder, President and Senior Consultant, Business Consulting Resources



A long-time Hawaii resident, Ken Gilbert is co-founder of Business Consulting Resources, Inc. He offers over 35 years of family business consulting knowledge and holds a B.S.B.A. in personnel and employee relations and a master's degree in international business from the American

University in Washington D.C. His experience includes working with Hawaii- and California-based family businesses in the areas of strategic planning development and implementation, succession planning and mergers and acquisitions.

### GUILLERMO GONZALEZ JR.

Associate Vice President, Bolton & Company



As associate vice president, Guillermo Gonzalez Jr. has a passion for implementing integrated HR solutions for clients and is dedicated to helping employers define company culture through custom benefit offerings and contribution strategies. He seeks to advise and consult with HR

professionals on best practices and help streamline benefits administration for clients, designing unique service models based on individual needs.

Gonzalez brings with him deep industry experience, including seven years at Arroyo Insurance, where he focused on serving nonprofits while leading a client services team and implementing strategies, benefits programs, talent retention plans, culture change initiatives and training that strengthened companies. He holds multiple broker licenses, including life, accident, health and property and casualty. He is a member of the Society for Human Resource Management (SHRM) and is actively pursuing the SHRM Certified Professional designation. In his personal time, he volunteers for Union Rescue Mission and the Children's Hunger Fund.

### ELAINE K. HAGAN ('91)

Executive Director, Harold and Pauline Price Center for Entrepreneurship & Innovation, UCLA Anderson School of Management



Elaine Hagan is executive director of UCLA Anderson's Harold and Pauline Price Center for Entrepreneurship & Innovation. She leads the Price Center team in managing a portfolio of teaching, research, extracurricular and executive development programs in the areas of entrepreneurship and

innovation, including UCLA's undergraduate minor in entrepreneurship and the UCLA Anderson Venture Accelerator. Her role also includes collaborative efforts related to development, alumni and other entrepreneurial ecosystems. Previously, she worked for Stanford University's Office of Development and on the turnaround team of a privately held manufacturing firm in San Diego.

She received her bachelor's degree from the University of California, Irvine and her MBA from UCLA Anderson School of Management.

### HOLLY HAN ('02)

Director, Special Projects and Steinbeck Family Business Seminar, | UCLA Anderson School of Management



Holly Han is an entrepreneur and business strategist who founded and led media, technology, consumer products and fashion businesses in New York and Los Angeles for over two decades. She began her career at Vera Wang and developed product for Bloomingdale's and Anthropologie, authoring the *Vault Career Guide to the Fashion Industry*. She received her MBA from UCLA Anderson School of Management, where she received fellowships from the Young President's Organization and Asian Business League. She also holds degrees from the University of California, Berkeley and the Fashion Institute of Technology, with additional studies at Caltech and Parsons School of Design, and was a professor at Marylhurst University's MBA program.

Han was a co-founder of MyShape, an innovative online retailer with over 700,000 members backed by Draper Fisher Jurvetson and Tenaya and featured in *The New York Times* and *The Wall Street Journal*. She also founded Dahlia, establishing a new model for the pearl industry by disrupting Tahitian market hegemony. As COO of SmartWear, she developed a new class of patented energy-generating textiles in partnership with DuPont, Nike, the NIH, NSF and NASA. She restructured luxury chocolatier John Kelly Chocolates as COO, with a focus on profitability and targeted expansion. She was a founding account director for the Taproot Foundation in Los Angeles, providing pro bono consulting for deserving nonprofits. She is on the board of directors for CHAMPS Charter High School of the Arts.

Han is director of special projects at the Price Center for Entrepreneurship & Innovation at UCLA Anderson, where she managed the Knapp Innovation, Creativity & Knowledge Conference for Women, Entrepreneurs Conference, Steinbeck Family Business Seminar and Woo Greater China Business Conference. She also counsels students and alumni on entrepreneurship. As managing director of 64North, she leads business strategy, branding and digital media for clients including MIT, Target, Yves Saint Laurent and Motown's Berry Gordy.

### RYAN MARTINEZ, CFP®

Principal, AB Bernstein Private Wealth Management



Ryan Martinez advises high-net-worth individuals, families, endowments and foundations regarding investment and planning strategies. He works closely with clients and their professional advisors on a wide range of complex matters, including succession planning for privately held business owners and planning for tax, estate and charitable endeavors.

Prior to beginning his career as a financial advisor, Martinez successfully led a business unit for a Fortune 100 Best Company to Work For. He was twice recognized as consultant of the year. He earned a B.S., cum laude, in business, with minor in economics, from California Polytechnic State University, San Luis Obispo. He holds the Certified Financial Planner designation (CFP®) and has completed the advanced financial planning program at Boston University.

Martinez currently serves on the Dean's Advisory Council at Cal Poly College of Business, as well as the Hawaii Arts Alliance and Latino Deal Makers boards. He is involved in several philanthropic organizations, including the Fulfillment Fund and The Giving Spirit. He is also a past president of the Los Angeles Estate Planning Council. He and his family reside in Los Angeles.

## SPEAKER AND PANELIST BIOGRAPHIES

### ALFRED E. OSBORNE JR.

Senior Associate Dean and Professor, UCLA Anderson School of Management



Alfred E. Osborne Jr. is senior associate dean; professor of global economics, management and entrepreneurship; and founder and faculty director of the internationally recognized Harold and Pauline Price Center for Entrepreneurship & Innovation at UCLA Anderson School of

Management, where he teaches courses in entrepreneurial strategy, technology commercialization, corporate innovation and family business. A corporate governance expert, he is also the co-faculty director of UCLA Anderson's Corporate Governance program. Currently, he serves as a member of the board of directors of Kaiser Aluminum, Nuvera Environmental Solutions, Wedbush and First Pacific Advisors.

Previously, Osborne was an economic fellow at the Brookings Institution and directed studies at the United States Securities and Exchange Commission (SEC) that contributed to improved liquidity and capital market access for early-stage ventures and investors. He is also active in the area of social impact, having founded several management development programs that work with leaders of nonprofit health and education systems in underserved communities. He is a trustee of Harvard-Westlake School and chairman of the Fidelity Charitable, which was recognized recently as the largest public charity in the United States. He received his B.S. in electrical engineering, M.A. in economics, MBA in finance and Ph.D. in business economics from Stanford University.

### LANDON PAULSON, CIC

Assistant Vice President, Bolton & Company



Landon Paulson is focused on working closely with his clients to ensure their risk management needs and financial goals are being met and supported. He has multiple years of experience working with a large array of clients, including those in the nonprofit and social service sectors. In his role

as assistant vice president, Landon seeks to provide the solutions and service that help perpetuate the underlying business objectives of his clients.

Originally from Sacramento, Paulson studied business management at Chico State University, graduating in 2014. Prior to joining Bolton & Company, he was with Philadelphia Insurance for three years. He holds a Certified Insurance Counselors (CIC) designation. When he's not providing his clients with proactive risk management solutions, he enjoys playing soccer, backpacking and snow sports.

### MICHELLE REAGAN

Vice President, Sr. Business Banking Relationship Manager, City National Bank



Michelle Reagan is a vice president, senior business banking relationship manager for City National Bank located in West Los Angeles. She is a business specialist servicing credit and other banking needs for companies of the Greater Los Angeles area. She has more than 25 years of experience in

finance, investment management and treasury operations. Prior to banking, she was the assistant treasurer for Mattel Inc., and worked at AIG SunAmerica and Coopers & Lybrand.

### EUGENE "ROD" RODDENBERRY

CEO, Roddenberry Entertainment  
Vice President, The Roddenberry Foundation  
Founder, Roddenberry Adventures



Eugene Wesley "Rod" Roddenberry Jr. is the guardian of the Roddenberry legacy and champions its timeless and universal ideals to new generations through creative and inspiring science fiction productions, merchandise, publishing, underwater adventures and philanthropy. As the

son of legendary science fiction producer Gene Roddenberry, whose "Star Trek" series changed the face of television and continues to inspire today, Rod has followed in his father's footsteps as a catalyst in the creation of a world where humanity works together for the greater good.

In 2001, Rod became chief executive officer of Roddenberry Entertainment, a science fiction leader with a tradition of groundbreaking entertainment. Roddenberry Entertainment builds on the best of Gene Roddenberry's work and continues to pioneer the development of a multimedia portfolio of smart and provocative science fiction that incorporates graphic novels, comics, podcasts and television and film projects, including the critically acclaimed Trek Nation, which debuted in 2011.

Trek Nation is the documentation of Rod's 10-year journey to explore his father's life. The undertaking inspired him to fully embrace the vision Gene had for the world and invest himself in its future. One expression of this was the founding of The Roddenberry Foundation in 2010. The Roddenberry Foundation funds paradigm-changing solutions to critical global issues in science and technology, the environment and education.

The Roddenberry legacy is further lived out through the Roddenberry Dive Team, which has recently evolved into Roddenberry Adventures. Much as his father navigated the universe through "Star Trek," Rod founded and leads the adventure-based organization in its exploration of strange, new underwater worlds and strives to inspire stewardship of our oceans. A scuba diver since 1993, he holds a Divemaster certification and has participated in or led more than 1,000 dives in exotic locations around the world.

### JEAN SANTOS

Co-Founder, Vice President and Senior Consultant, Business Consulting Resources



A founding member of Business Consulting Resources, Jean Santos brings over 35 years of experience to family-owned companies in organizational development, strategic planning and market strategies, human resources, executive coaching, team building and leadership development. She has a

master's degree in communication and organizational development from the University of Hawaii at Manoa.

### JONATHAN SCHRETER ('02), CIC

Executive Vice President, Bolton & Company



For the past 13 years, Jonathan Schreter has served commercial property and casualty risks, primarily for charter and independent schools (K-12) and higher-education clients, as well as middle-market businesses in the technology, manufacturing and entertainment

industries. With a diverse background that began in marketing and advertising, he combines creative thinking and analytics to offer a consultative approach to risk management. He works with progressive school and business leaders who appreciate his commitment to mitigating unexpected losses.

Schreter earned his MBA from UCLA Anderson School of Management in 2000 and his Certified Insurance Counselor (CIC) designation from the

## SPEAKER AND PANELIST BIOGRAPHIES

National Alliance for Insurance Education and Research in 2010. He was president of the Independent Brokers and Agents Association of the San Fernando Valley, is the current president of the UCLA Anderson Alumni Network in Los Angeles and serves as treasurer on the executive committee for the board of directors of Inner-City Arts, a nonprofit program that unlocks the creative potential of inner-city children in downtown Los Angeles. These accomplishments pale in comparison to his 11-year marriage to his wife, Jennifer, and their two children, Samantha and Blake.

### ERIC SUSSMAN

Adjunct Professor of Accounting, UCLA Anderson School of Management



Since 1995, Eric Sussman has been teaching courses in the areas of cost/managerial accounting, financial accounting, financial statement analysis, equity valuation, corporate financial reporting and real estate investment and finance to undergraduate, graduate and executive education students.

Throughout his teaching career, he has remained active in the real estate industry. He is president of Amber Capital Inc., manager of Fountain Management LLC and Clear Capital LLC, and managing partner of Sequoia Real Estate Partners and the Pacific Value Opportunities and Clear Opportunity funds, which have acquired, rehabilitated, developed and managed more than 2 million square feet of residential and commercial real estate in the past 20 years. The firms' portfolio at present consists of industrial, multi-family and single-family residential, and retail properties.

Sussman is also chairman of the board of trustees of Causeway Capital's group of funds (international value, emerging markets, global value, global absolute return funds, and international small cap), which collectively have more than \$9 billion in assets. He sits on the board of Pacific Charter School Development Inc. and was former chairman of the Presidio Fund and former audit committee chair of Atlantic Inertial Systems Inc., a producer and manufacturer of electromagnetic sensors.

With his wide range of expertise, Sussman has consulted for large and small firms, nationally and globally, and is a frequent lecturer on varied financial, accounting and corporate reporting topics. He has served as an expert witness and consultant for commercial litigation, involving matters of corporate financial reporting and disclosure, audit effectiveness, valuation, real estate due diligence and related practices, and overall damage analyses. He is a licensed CPA in California. He is an eight-time winner of the MBA Teaching Excellence Award, a seven-time winner of the FEMBA Teaching Excellence Award and recipient of numerous other teaching awards and national recognitions.

### MIGUEL M. UNZUETA

Associate Professor of Management and Organizations,  
UCLA Anderson School of Management



Miguel Unzueta is an associate professor of management and organizations at UCLA Anderson School of Management. He joined the faculty at UCLA in 2006 after earning his Ph.D. in organizational behavior from the Stanford Graduate School of Business. His research

explores how people understand their positions within social and interpersonal hierarchies and the impact this understanding has on their perceptions of self, others and group-based inequality. His latest research explores the manner in which people define diversity and the impact that particular diversity definitions have on the representation of underrepresented group members in organizations. His research has been published in top management and psychology journals including *Organizational Behavior and Human Decision Processes*, the *Journal of Personality and Social Psychology*, *Psychological Science*, and the *Journal of Experimental Social Psychology*. In recognition of his research record, he was awarded the Eric and "E" Juline award for excellence in faculty research at UCLA in 2012.

Unzueta teaches courses on managerial psychology (MGMT 409) and negotiations (MGMT 286) in both the FEMBA and full-time MBA programs. In 2010, HE was awarded the George Robbins Teaching Award at UCLA Anderson. More recently, he was selected by MBA blog Poets and Quants as one of the best 40 business school professors under age 40. Outside of UCLA, he has conducted trainings on decision making, negotiations, diversity and implicit bias to various educational institutions and companies, including the Scripps Research Institute, Office of Head Start, Inner City Law Center, and Oklahoma City Thunder basketball team. He is currently a consulting editor for *Personality and Social Psychology Bulletin* and the *Journal of Social Issues*. He is also the faculty director for the UCLA Anderson/Johnson & Johnson Management Development Institute, a program designed to enhance the leadership and management skills of managers and leaders of sub-Saharan African organizations devoted to delivering health care services to underserved populations throughout Africa.

### NICOLE VERMEER

Chair, Vermeer Corporation Family Council  
Shareholder Governance, Vermeer Corporation  
Co-Founder, Social Capital Philanthropists  
Director of Advancement, UCLA Ziman Center for Real Estate



Nicole McAllister Vermeer is a third-generation member of the Vermeer family, member of the Ownership Council Governance Committee and chair of the Gary Vermeer Family Council. Currently serving her fourth term as chair, she assists the family in successfully identifying opportunities, implementing new initiatives and navigating complex transitions. Over the past nine years, she has worked with Vermeer's Family Office, the Ownership Council and branches of the family to help develop the Family Council and Ownership Council strategic plans, shareholder director nomination process, mentorship program, married-in orientation, revised family charter and code of conduct, shareholder agreement, family employment policy, education and travel policies and other efforts. She is now focusing on customized shareholder engagement strategies and reinvention of the family council platform to advance the Ownership Council's and Vermeer Corporation's goals.

Vermeer Corporation is a global industrial manufacturing corporation with approximately \$1 billion in annual sales worldwide. Now in its third generation of family leadership operating in 60 countries with over 3,000 employees, Vermeer Corporation is a leader in the agricultural, environmental, utility installation, pipeline, specialty excavation and mining equipment industries.

Outside of the family, Vermeer leads the ongoing development, external affairs and corporate strategy initiatives of a university-wide policy center within UCLA, where she is directing efforts for the \$4.2-billion Centennial Campaign. She was previously the vice president of development and external affairs for the Pacific Council on International Policy, an international policy think tank affiliated with the University of Southern California. She began her career as an affordable housing developer and policy advocate.

Vermeer serves on the board of directors and finance committee of Affordable Living for the Aging and is a co-founder of Social Capital Philanthropists, a crowdfunded grant-making collective in Los Angeles. She earned an MBA, with emphases in finance and strategy, from the University of Southern California and a master's degree in urban planning, with concentrations in community development and environmental policy, from the University of California, Los Angeles after graduating from the University of California, San Diego. She and her husband live in Los Angeles with their four children.

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The Steinbeck Family Business Seminar Advisory Committee,  
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and all of those who contributed to making this seminar a success.

UCLA Anderson Steinbeck Family Advisory Committee:

Shirin Berjis  
Senior Manager, Tax, Economic & Valuation Services  
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Aaron Dyer  
Senior Vice President, Business Banking Regional Manager  
City National Bank

Ken Gilbert  
Co-Founder, President and Senior Consultant  
Business Consulting Resources

Elaine Hagan  
Executive Director  
Harold and Pauline Price Center for Entrepreneurship & Innovation  
UCLA Anderson School of Management

Holly Han  
Director, Special Projects and Steinbeck Family Business Seminar  
UCLA Anderson School of Management

Ryan Martinez  
Principal  
AB Bernstein Private Wealth Management

Alfred E. Osborne, Jr.  
Senior Associate Dean and Professor  
UCLA Anderson School of Management

Jean Santos  
Co-Founder, Vice President and Senior Consultant  
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