



STEINBECK FAMILY BUSINESS SEMINAR

May 11 and 12, 2023

UCLA Harold and Pauline Price Center
for Entrepreneurship & Innovation

CONFLICT IN THE BUSINESS

Unconstrained by the scrutiny of public shareholders, family businesses can focus on long-term goals. However, management decisions can be influenced by nepotism and lead to trouble. These issues make family businesses more complex to operate, which is why less than 4% survive to the fourth generation.

The Steinbeck Family Business Program offers a series of workshops and conferences focused on leading effective and profitable family-owned (or closely held) businesses.

UCLA Anderson
School of Management

THURSDAY, MAY 11, 2023

1:00 – 1:25 P.M. INTRODUCTION (A201)

HOLLY HAN ('02)

Director of Special Projects and Steinbeck Family Business Seminar, Price Center for Entrepreneurship & Innovation, UCLA Anderson

OLAV SORENSON

Joseph Jacobs Chair in Entrepreneurial Studies; Professor of Strategy; Faculty Research Director, Price Center for Entrepreneurship & Innovation, UCLA Anderson

JAY STEINBECK

1:25 – 2:15 P.M.

ROUNDTABLE INTRODUCTION TO FAMILIES (A201)

Moderated by Daniel A. Nathanson | Faculty Advisor and Continuing Lecturer, UCLA Anderson

2:15 – 3:15 P.M.

THE ACQUISITION AND EXPANSION OF MCCONNELL'S FINE ICE CREAMS (A201)

Michael Palmer grew up in Santa Barbara with McConnell's Fine Ice Creams. Founded in 1949, McConnell's makes its ice cream from scratch with decadent, high-butterfat dairy ice cream and features signature flavors ranging from Eureka Lemon and Marionberries to Toasted Coconut Almond Chip. When their house burned down in the wildfires, Palmer, a winemaker, and his wife, Chef Eva Ein, decided to buy McConnell's instead of rebuilding. The owner at the time chose them over other buyers because he wanted McConnell's to remain a family business and maintain its artisan reputation.

In the first year post-acquisition, they won best dessert in America at the Fancy Food Show in New York City. The Palmers used their insurance money, along with other funds, to rebuild the dairy operation and purchase new equipment. The company makes 100% of its products and everything that goes into them (cookie bits, swirls, etc.). Today, McConnell's is now sold in more than 2,000 stores throughout the U.S., operates its own scoop shops, sells to restaurants and ships products nationwide through its website. Palmer is an advocate of slow growth to ensure products are unique and compelling.



MICHAEL PALMER

Chief Executive Officer,
McConnell's Fine Ice Creams



**MODERATOR
GEORGE ABE**

Adjunct Assistant Professor of Entrepreneurship, UCLA Anderson

3:15 - 3:25 P.M. BREAK

3:25 - 4:00 P.M.

ACQUISITIONS: AN OPTION FOR GROWTH (A201)

Family enterprises often overlook business acquisition as a path to growth or expansion. Families may consider a variety of growth strategies and alternatives to preserve their assets. Business acquisition makes sense for most people who want to run their own business. The retirement and passing of baby boomers means there is a large number of good businesses available for sale today. This session will present pointers for buying (or selling) a business and improving odds for future growth along with a due diligence checklist for the buyer.



MODERATOR
GEORGE ABE

Adjunct Assistant Professor of Entrepreneurship,
UCLA Anderson

4:00 - 5:00 P.M.

FAMILY FOUNDATION ENGAGEMENT (A201)

Family foundations range in asset size from a few hundred thousand dollars to more than \$1 billion. The holdings of family foundations total approximately \$294 billion, which is about 44 percent of all foundation holdings (\$662 billion). Yet, 3 out of 5 family foundations hold assets of less than \$1 million. Family foundations can provide a framework for philanthropy, expand pathways to giving, engage broader perspectives, create solutions that lead to a better future for all and include income tax and estate tax benefits.

Join us to hear about the creation of the Roddenberry Foundation, which was inspired by the legacy of Gene Roddenberry, the creator and producer of the original Star Trek television series. The series spawned over 700 TV episodes, 14 movies and comic books, animated series and a global following. Its enduring resonance is a testament to Roddenberry's vision for a future where diversity and tolerance are encouraged and in which inclusivity and equality are the norm. The Roddenberry Foundation supports innovative thinking, original ideas and extraordinary people who can change the world.



HEIDI
RODDENBERRY
President and Board Chair,
Roddenberry Foundation



MODERATOR
HOLLY
HAN ('02)

Director of Special Projects and Steinbeck Family Business Seminar,
Price Center for Entrepreneurship & Innovation, UCLA Anderson

5:00 - 6:00 P.M. NETWORKING COCKTAIL RECEPTION (C ATRIUM)

8:00 – 9:00 A.M. BREAKFAST (C ATRIUM)

9:00 – 9:50 A.M. CONCURRENT SESSIONS

CONFLICT AND THE FAMILY BUSINESS (C315)

Conflict is inevitable when working with family and scaling the business. The challenges and complications increase when your parents, cousins and siblings work together. Elizabeth Tene of Access General Contracting will share her experiences transitioning the family business from her parents to her and her brother and navigating their sibling dynamic as they grew the enterprise.

Family business conflicts may arise from emotional baggage, vastly different communication styles, and conflicting goals and priorities. To address these issues, we will discuss techniques such as negotiation, mediation and collaboration, as well as establishing boundaries and roles.



**ELIZABETH
TENE**

President,
Access General Contracting



MODERATOR:
**KEN
GILBERT**

Co-Founder,
Business Consulting Resources



MODERATOR:
**JEAN
SANTOS**

President and Co-Founder,
Business Consulting Resources

ESTATE PLANNING IN UNPREDICTABLE TIMES: PLANNING STRATEGIES THAT PROVIDE FOR FLEXIBILITY WITH IMPERFECT OR UNKNOWN INFORMATION (A201)

Chris Welton's interactive session will focus on answering the three basic questions of estate planning: Where do your assets go? Who is in charge? What are the rules? He will discuss four "weapons you can use with your illiquid assets to ensure that your estate is tax-efficient and your wealth passes to your desired entity.



**CHRIS
WELTON ('12)**

Wealth Management Advisor and
Managing Director, Northwestern Mutual

9:50 – 10:00 A.M. BREAK

10:00 – 11:00 A.M.

NAVIGATING A FRAGILE ECONOMY (A201)

Inflation, interest rates and employee layoffs remain extremely high. Banks are in crisis, but that may not lead to an immediate recession. Higher-income households saved money during the pandemic, but even they are starting to feel the pinch of inflation. Low- and middle-income households are reeling from high prices. Increased political unrest will pose a risk to the global economy's recovery, as it can have a lasting impact on economic performance. In an environment with so much uncertainty and risk, what might the economy and investment markets look like for the rest of 2023 and beyond.

Professor Eric Sussman will cover the complex market, economy, regulations and technology, and offer his predictions. Sussman has been voted Teacher of the Year 15 times by Anderson's MBA students and was awarded the Citibank Teaching Award in 1998, the Neidorf Decade Teaching Award in 2008 and the University-wide Distinguished Teaching Award in 2015. He has also been recognized by *Bloomberg Businessweek* as one of the Top Ten Most Popular Business School Professors in the country.



**ERIC
SUSSMAN**
Adjunct Professor,
UCLA Anderson

11:00 A.M. – 12:00 P.M.

CONFLICT MANAGEMENT (A201)

Conflicts frequently occur in many day-to-day interactions in family businesses, and if left unresolved, may jeopardize the business. Professor Bendersky will present information and answer questions about best practices for managing conflicts. She will share ways to de-escalate emotionally intense situations and identify each person's concerns and interests in order to pursue mutually satisfying outcomes. Participants will gain new tools for navigating the complex relationships in family businesses.

Corinne Bendersky is an expert in workplace conflict, status, justice, and diversity and inclusion in teams and organizations. Bendersky's research contributes to both academic knowledge and organizational practice. In recent projects, Bendersky has developed interventions to reduce the gender bias experienced by women who work in extremely male-dominated professions, like the U.S. fire service, and conducted a workplace DEIB climate assessment for public-sector employees of the City of Los Angeles. Dr. Bendersky is the Faculty Director of the Human Resources Roundtable at UCLA, known as HARRT, and Founder of Morpho Leadership Development consulting.



**CORINNE
BENDERSKY**
Professor and Area Chair of Management
and Organization, UCLA Anderson

12:00 – 1:00 P.M. LUNCH (C ATRIUM)

1:00 – 1:50 P.M. CONCURRENT SESSIONS

MITIGATING RISKS IN UNSTABLE MARKETS (A201)

If you own a business, you have risk. With all the challenges businesses face on a daily basis, carving out time to identify, assess and plan for these risks can be daunting and time-consuming. However, the businesses that are prepared are always better off.

Join us to learn more about timely topics like cybersecurity, employment practices and supply chain risk. We'll also share the causes of broad insurance rate increases and some immediate steps you can take to control these expenses for your venture.



**DAVID
MELNICK ('96)**
CEO, Ledger Works, Inc



**JONATHAN
SCHRETER ('00)**
Executive Vice President,
Bolton & Company

ECONOMIC INSIGHTS FOR TODAY'S TUMULTUOUS TIMES (C315)

Ryan Martinez will moderate a discussion regarding the economic outlook and insights in today's environment. This session will include an overview of and update on the stability of banks, the state of M&A and drivers for market value for private businesses moving forward.

Bernstein is a leading global investment management and research firm with \$780 billion under management. In addition to managing capital for institutional investors, It manages money for successful business owners and entrepreneurs.



**CLAY
BRYAN**
Senior Managing Director,
Financial Sponsors Group,
B. Riley Securities



**AYTAN
DAHUKEY**
Partner,
Corporate Practice Group,
Sheppard Mullin



**MODERATOR:
RYAN A.
MARTINEZ**
Principal, Bernstein Private
Wealth Management

1:50 – 2:00 P.M. BREAK

2:00 – 3:00 P.M.

A FAMILY AFFAIR (201)

Galpin has been family-owned and -operated since 1946. Over the last 76 years, Galpin has reached the pinnacle of the automotive industry, being credited with countless industry firsts and earning the recognition as the most honored dealership group in America. Galpin Ford has been the No. 1 Ford dealer in the world in terms of volume for a record 29 consecutive years, and every Galpin dealership — Porsche, Land Rover, Jaguar, Aston Martin, Lotus, Lincoln, Honda, Mazda, Volkswagen, Volvo and Polestar — has reached exceptional sales levels. Galpin Studio Rentals is a leader in the entertainment industry. Galpin Auto Sports, its in-house customizing shop, has earned worldwide recognition and been featured in two TV shows, “Pimp My Ride” and “Car Kings.” Galpin’s Horseless Carriage restaurant is the first-ever in-dealership restaurant. Galpin’s latest venture, The Autopian, is the fastest-growing automotive enthusiast website. *Automotive News* has ranked Galpin Motors in the top 50 automotive groups, with over \$1 billion in annual revenue.



**BEAU
BOECKMANN**
President, Galpin Motors,
Galpin Premier Collection and
Galpin Auto Sports



**MODERATOR
ALFRED E.
OSBORNE, JR.**
Professor Emeritus, Global Economics and Management;
Faculty Director Emeritus, Price Center for
Entrepreneurship & Innovation, UCLA Anderson

3:00 – 3:30 P.M. CLOSING (A201)

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



George Abe

GEORGE ABE | ADJUNCT ASSISTANT PROFESSOR OF ENTREPRENEURSHIP, UCLA ANDERSON

In 1976, George Abe joined Computer Sciences Corp (CSC). Abe designed the IP data service for CSC's spinoff, Infonet Services Corporation, and later signed on as business development manager at Cisco, where he became the product manager for data over cable products. In 1997, Cisco published his book *Residential Broadband*, an early practical guide to what were then emerging access networks and internet technologies, which has been published in two editions.

After Cisco, Abe was a venture partner with Santa Monica-based Palomar Ventures and served on various corporate and nonprofit boards. In 2002, he joined UCLA's technology transfer office, as Business Development Manager. In 2003, he joined the faculty at Anderson. Abe serves on the board of advisers for UCLA's Terasaki Center for Japanese Studies and Biotech Connection, Los Angeles. He is author of the newly published *Entrepreneurship: A Tools-Oriented Approach* (Vandeplas Publishing, 2020).



Corinne Bendersky

CORINNE BENDERSKY | PROFESSOR AND AREA CHAIR OF MANAGEMENT AND ORGANIZATION, UCLA ANDERSON

Professor and Area Chair of Management and Organizations Corinne Bendersky is an expert in workplace conflict, status, justice, and diversity and inclusion in teams and organizations. Bendersky's research contributes to both academic knowledge and organizational practice.

In recent projects, she has developed interventions to reduce the gender bias experienced by women who work in extremely male-dominated professions, like the U.S. fire service. She has advanced methods to measure the effects of different configurations of conflicts expressed within teams. She also has been using machine learning techniques to study conflict expressions in Wikipedia editorial disputes, and how working women have been represented in the news media from the passage of the Equal Pay Act in 1963 through the #MeToo movement in 2018. Bendersky teaches in UCLA Anderson's Full-Time and Fully Employed MBA programs, as well as in many of its executive education programs. As faculty director of the UCLA human resources (HR) roundtable known as HARRT, she engages with a mix of academic, consultant and practitioner knowledge of cutting-edge HR topics with the roughly 50 corporate HR executives who are members. As founder of Morpho Leadership Development, she consults with corporate and public service agency executives, particularly on conflict management and diversity and inclusion.



Clay Bryan

CLAY BRYAN | SENIOR MANAGING DIRECTOR, FINANCIAL SPONSORS GROUP, B. RILEY SECURITIES

Clay Bryan has approximately 21 years of experience in sponsors coverage, debt and equity capital markets, M&A and special situations, providing solutions to investors ranging in size from middle market to large cap public companies.

Bryan has advised clients across a range of industries and has covered entrepreneurs, private equity funds and other asset managers throughout his career. He has worked at both bulge bracket and boutique investment banks, structuring and executing complex transactions both in the U.S. and internationally. Prior to joining legacy FocalPoint, now B. Riley Securities, he was a managing director at Cappello Global and worked in the sponsors coverage and M&A groups at Deutsche Bank and Citigroup, respectively.

Bryan received a B.B.A. in finance and economics from Georgia State University. He is also a member of the Water Buffalo Club, a charitable organization that directs its efforts to assisting at-risk children in Los Angeles.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Beau Boeckmann

BEAU BOECKMANN | PRESIDENT OF GALPIN MOTORS, GALPIN PREMIER COLLECTION, AND GALPIN AUTO SPORTS

Growing up on the showroom floor of Galpin Ford and having worked in the business over thirty years, Beau Boeckmann, a Native Angelino, has loved and lived the automobile business his entire life. He is President of Galpin Motors which holds franchises for Ford, Porsche, Aston Martin, Land Rover, Jaguar, Lotus, Volvo, Polestar Lincoln, Honda, Mazda, and Volkswagen. Galpin Motors is America's most honored and trusted dealership family. It has held top leadership positions with many of its brands, including Galpin Ford, that not only holds a twenty-nine-year record as #1 in the world but also nearly every award and recognition that Ford has ever offered.

Galpin's history of customizing began in 1952 when their custom Ford was featured on the cover of Motor Trend magazine. Their performance heritage includes deep roots in the many forms of racing including even winning the NASCAR West Coast Championship four years in a row in the 1960s. With a true passion for automobiles, Beau opened Galpin Auto Sports in 2006. GAS, as it is often known, became an industry leader in customizing all makes and models including classic car resto-mods and restorations as well as new-car customization. This would launch Beau into the next phase of building some of the most unique designs the automobile industry has ever seen, starring on the #1 rated automotive show and worldwide phenomenon, Pimp My Ride, which was seen in over one hundred countries with over one billion views. In 2022 Beau starred in a new tv show, Car Kings on the Discovery Channel.

Beau's passion for all things automotive didn't stop there. In March of 2022, he co-founded an automotive website and media company called The Autopian. The Autopian's goal is to serve the car enthusiast community by sharing stories that inform and entertain, while celebrating the unifying quality of automobiles.

As a visionary and enthusiast, Boeckmann's merits include Petersen's Automotive Museum's First Visionary Award, and he was inducted into the National Rod & Custom Car Hall of Fame. Beau is a member of both the Ford Motor Company and Lincoln Product Committees, and the Ford Dealers Advertising Association. He has also served on the Lincoln Dealer Council, Aston Martin's Dealer Advisory Panel, Saleen's Board of Directors, and the Pasadena Art Center College of Design Advisory Network. In 1992 Beau graduated from USC's Entrepreneurship program. He was a member of the Hollywood chapter of YPO and is currently a member of YPO Gold Pacific.

Beau is continuing his family legacy and passion for community involvement and philanthropy. He has been recognized for his community work by organizations such as New Horizons, which honored him with its Dignity, Love and Compassion Award, the Boys & Girls Club of the San Fernando Valley, Wheels for Humanity and the Los Angeles Sheriff's Reserve Foundation which honored Beau with its Twice a Citizen Award.

In addition to all these, he and his lovely wife, Mary, raised six wonderful children together.



Aytan Dahukey

AYTAN DAHUKEY | PARTNER, CORPORATE PRACTICE GROUP, SHEPPARD MULLIN

Aytan Dahukey is a partner in the Corporate Practice Group in Sheppard Mullin's Century City office. Dahukey is the leader of the firm's Private Equity team and is also a member of the firm's Healthcare and Emerging Growth/Venture Capital teams. As an active member of these industry teams, he enjoys a wide-ranging practice that spans several sectors. He has represented private equity funds in numerous large leveraged buyout, add-on and divestiture transactions, and has also represented owners of a wide variety of private businesses in sales to private equity funds and other strategic investors.

Dahukey has extensive experience advising clients and negotiating mergers, asset and stock acquisitions, divestitures, leveraged buyouts, professional services and management services arrangements, employment and independent contractor arrangements (both for executive officers and for physicians and ancillary providers), and other strategic alliances. He also regularly provides counseling to clients with respect to formation, private placements, corporate governance, physician and ancillary provider contracting, and other day-to-day operational matters. He also handles pro bono adoption cases through Public Law Center's Children's Rights Program and is a member of the firm's pro bono committee.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Ken Gilbert

KEN GILBERT | CO-FOUNDER, BUSINESS CONSULTING RESOURCES

A long-term Hawaii resident, Ken is the CEO/President and co-founder of Business Consulting Resources. He brings BCR's clients over forty years of consulting knowledge working with private and public corporations, not-for-profits, the military and government agencies. BCR has grown over the past 40 years having built consulting teams focused on Hawaii, California, Texas and Florida.

Under Ken's leadership, Business Consulting Resources has consulted with well over 400 Hawaii, mainland and international companies in diverse areas including: succession and transition planning and implementation; strategic planning; strategic partnering; financial management; human resources; mergers and acquisitions; commercial real estate; new business development; life coaching; career transition coaching and leadership development.

Prior to co-founding BCR in 1981, Ken founded his own Life Insurance Agency in Hawaii and expanded that Company into a real estate and development firm, growing the Company to over 40 employees. Ken has owned and operated other diverse businesses throughout his career.

Ken is a management consultant and coach to many CEOs and senior executives in a number of industries including: maritime industry; banking, insurance; real estate; retail, construction; manufacturing; government and military; and the visitor industry. He works with corporate executives in diverse areas which include strategy development and implementation, leadership skill development and building and creating effective teams. Ken is also known as a Master Life Coach, notably guiding individual clients of all ages in creating Life Plans, which give them a map for achieving their life goals and dreams.

As Hawaii's premier Family Business Consultant, Ken is the past Chair of the Advisory Board of the Family Business Center of Hawaii, which is one of the top-ranked family business centers in the U.S. BCR is one of the major sponsors of the UCLA Anderson Graduate School of Management Steinbeck Family Business Program in Los Angeles. BCR is also in a strategic partnership with Loyola Marymount University (LMU) and is working with LMU to create and assist in operating and building the LMU Entrepreneurial Family Business Center.

Ken embodies the entrepreneurial spirit and learned early on that providing an objective and high-level perspective to BCR clients is the key to the firm's long-term success. By instilling this characteristic with Business Consulting Resources clients, BCR has given clients the ability to navigate any trend, obstacle, or roadblock to success they may face.

Ken earned a B.S.B.A. in Personnel and Employee Relations; and a Master of Science in Business and Governmental Relations, and International Business from the American University in Washington D.C.

Ken is quite active in the Hawaii business community and has served on the Board of Directors of the Chamber of Commerce of Hawaii, the Hawaii State Art Museum and numerous other for and not-for-profit organizations. Ken is very involved with the Family Business Center of Hawaii and was a past chair of this organization's board of directors and has served on the board for many years. Ken is a past president of the Metropolitan Rotary Club of Honolulu and has served several terms as a member of the Club's Board of Directors. Ken is a volunteer faculty member at Punahou School and also taught at the University of Hawaii and Hawaii Pacific University for over 10 years.

Ken is married to Jean Santos. They have twins, Kyler and Miranda, who both graduated from Punahou School. Kyler is a 2020 graduate of UCLA with a double major bachelor's degree in business economics and communication. He is working with the Capital Group, Los Angeles, and will pursue an MBA. Miranda earned her bachelors in political science in 2020 from LMU, and, in 2022, her master's in literature and gender studies at The New School in New York City. She plans on obtaining a Ph.D. and pursuing her academic and writing career.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Elaine Hagan

ELAINE K. HAGAN ('91) | ASSOCIATE DEAN, ENTREPRENEURIAL INITIATIVES AND 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

HOLLY HAN ('02) | DIRECTOR OF SPECIAL PROJECTS AND STEINBECK FAMILY BUSINESS SEMINAR, PRICE CENTER FOR ENTREPRENEURSHIP & INNOVATION, UCLA ANDERSON

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. Han 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 the UCLA Anderson School of Management, where she received fellowships from the Young Presidents' 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. 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. As the managing director of 64North, she led business strategy, branding and digital media for clients including MIT, Target, Yves Saint Laurent and Motown's Berry Gordy. She is the vice president on the board of directors for CHAMPS Charter High School of the Arts and runs marathons.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Ryan A. Martinez

RYAN A. MARTINEZ | PRINCIPAL, BERNSTEIN PRIVATE WEALTH MANAGEMENT

Ryan A. Martinez, CFP®, is a financial advisor and principal at Bernstein Private Wealth Management. He works closely with family business owners, entrepreneurs and corporate executives as their outsourced CFO and confidant. By proactively recognizing issues and opportunities, he empowers his clients to make educated, well-informed decisions that result in a more meaningful life and legacy for them and their families.

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 earned a B.S., cum laude, in business, with a minor in economics, from California Polytechnic State University, San Luis Obispo. He is a Certified Financial Planner and has completed the advanced financial planning program at Boston University.

Martinez is passionate about giving back to the community. He serves on the Dean's Advisory Council at Cal Poly San Luis Obispo College of Business, as well as on the board of the Latino Deal Makers. In addition, he acts as an advisor to UCLA Anderson's Steinbeck Center and the University of Hawaii's Family Business Center, and was the past president of the Los Angeles Estate Planning Council. His involvement in these organizations helps him develop key learnings, best practices and resources that he can share with his clients.

Martinez resides in West Los Angeles with his wife, Amanda, and their two young sons. They enjoy adventure travel and outdoor activities.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



David Melnick

DAVID MELNICK | MANAGING DIRECTOR OF WEBLIFE FUND AND CEO OF LEDGER WORKS

David was formerly Vice President Web Isolation at Proofpoint and previous founder and CEO of WebLife, brings almost 25 years' experience in technology and security. David speaks internationally about the intersection of cyber security and Web3



Daniel A.
Nathanson

DANIEL A. NATHANSON | FACULTY ADVISOR AND CONTINUING LECTURER, UCLA ANDERSON

Dan Nathanson is an entrepreneur, executive, investor, consultant and educator. Nathanson has a 25-year record of success in building businesses, creating financial value and helping entrepreneurs succeed. He is a visiting assistant professor at the UCLA Anderson School of Management, where he teaches Small Business Management and Business Plan Development, and is a faculty advisor in the AMR, GAP and SMR field study programs.

Nathanson began his executive career as the chief corporate planner in charge of mergers and acquisitions at Vernitron Corporation, a publicly traded diversified electronics firm. He then founded and served as CEO of Computerized Retail Systems (CRS), a nationwide turnkey point-of-sale computer company. After selling CRS in 1993, he became a clinical assistant professor at NYU's Stern School of Business, where he taught entrepreneurship and business strategy. In 2008, Nathanson accepted a teaching position as a visiting assistant professor at the UCLA Anderson School of Management and has resumed his mission of helping entrepreneurs succeed as the CEO of the Entrepreneurs Resource Group.

Nathanson holds a Ph.D. from the Wharton School of the University of Pennsylvania, an MBA from NYU's Graduate School of Business and a B.A. from Washington University in St. Louis. His publications include *Strategy Implementation: The Role of Structure and Process* (Galbraith and Nathanson, West Publishing Company, 1978) and various articles on business strategy and organizational design.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Alfred E. Osborne, Jr.

ALFRED E. OSBORNE, JR. | PROFESSOR EMERITUS, GLOBAL ECONOMICS AND MANAGEMENT;
FACULTY DIRECTOR EMERITUS, PRICE CENTER FOR ENTREPRENEURSHIP & INNOVATION

Alfred E. Osborne, Jr. served as UCLA Anderson's interim dean from July 1, 2018 to July 1, 2019. Osborne's areas of academic expertise include social entrepreneurship and the development of a leadership approach that applies business models and methodologies to the nonprofit world. Under his leadership, the Price Center created a number of management development programs, including five in partnership with health care giant Johnson & Johnson: the UCLA/Johnson & Johnson Head Start Management Fellows Program, the UCLA/Johnson & Johnson Advanced Management Institute for Head Start, the UCLA/Johnson & Johnson Health Care Institute, the UCLA/Johnson & Johnson Health Care Executive Program, and the Management Development Institute (MDI) for health care organizations in sub-Saharan Africa. Several related, innovative programs include the Institute for the Study of Educational Entrepreneurship (ISEE) and the UCLA/Los Angeles County Office of Education (LACOE) Head Start Leadership Institute.

A deep belief in the value of entrepreneurship has guided Osborne's vision for what is possible throughout his decades-long tenure at Anderson. In addition to founding the Price Center, he facilitated infusion of an entrepreneurial approach to leadership into the Anderson culture and curriculum, including and transcending the notion of business startups.

Osborne is an active participant in the business community, serving as a director of Kaiser Aluminum, Wedbush Inc. and the First Pacific Advisors (FPA) family of mutual funds. His nonprofit affiliations include serving as a trustee of the Geffen Academy at UCLA, Fidelity Charitable, the Harvard Westlake School and the Los Angeles Police Memorial Foundation. He served many years on the corporate boards of the Times Mirror Company, US Filter Corporation, Greyhound Lines Inc., Nuverra Environmental Solutions Inc., First Interstate Bank of California, Nordstrom Inc. and K2 Inc., among others.

While on sabbatical from UCLA in the 1970s, Osborne was an economic fellow at the Brookings Institution and directed studies at the Securities and Exchange Commission that contributed to changes in Rule 144, Regulation D and other exemptive requirements to the securities laws designed to lower costs and improve liquidity and capital market access to venture capitalists and emerging growth firms alike.

Osborne's research interests also include venture capital and private equity, family and closely held business, and the role of boards of directors in private, public and not-for-profit organizations.

A corporate governance expert, Osborne established a Director Education and Certification Program designed to help officers and directors of public and private companies and nonprofits prepare for the fiduciary duties and legal responsibilities of governance. This program also addresses best practices and topical issues confronting directors.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Michael Palmer

MICHAEL PALMER | CHIEF EXECUTIVE OFFICER, MCCONNELL'S FINE ICE CREAMS

Founded in 1949, McConnell's makes their ice cream from scratch with decadent, high butterfat dairy ice cream with signature flavors from Eureka Lemon & Marionberries to Toasted Coconut Almond Chip. Palmer, a winemaker, along with his wife, Chef Eva Ein, acquired McConnell's in 2012 when it was on the verge of bankruptcy. They now supply over 2,000 grocery stores including Ralph's, Whole Foods, Albertsons, Central Market, Target, Wegmans and others. McConnell's owns their retail shops in Southern California and operate a growing e-commerce business.



Heidi
Roddenberry

HEIDI RODDENBERRY | PRESIDENT AND BOARD CHAIR, RODDENBERRY FOUNDATION

Heidi Bianca Roddenberry (née van Lydegraf) embraces infinite diversity in infinite combinations. With an open mind, heart and spirit, she works to elevate the human condition, protect the planet and secure a beautiful future for all people. At the helm of the Roddenberry Foundation, she draws inspiration from Star Trek creator Gene Roddenberry in advancing big, bold ideas that can change the world. An explorer and global citizen, Heidi is a progressive leader in the realm of imagined possibilities, willing to take the risks necessary to realize a more inclusive, just and collaborative society. With a sense of wonder and eternal optimism that has guided her since childhood, she truly believes that if we can envision a future of hope and light, then we can achieve it, together.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Jean Santos

JEAN SANTOS | PRESIDENT & CO-FOUNDER, BUSINESS CONSULTING RESOURCES

A founding member of Business Consulting Resources, Jean manages the human resource and organizational development activities at BCR. She works extensively with family owned companies, private corporations, not-for-profits and government agencies.

Jean brings over 40 years of experience to Hawaii corporations and family owned enterprises in organizational development, strategic planning and market strategies, human resources, executive coaching, team building and leadership development.

Born and raised on O'ahu, she began her career in consulting after earning a B.A. and then her Master of Arts in Communication and Organizational Development from the University of Hawaii at Manoa.

Jean is an expert in workplace behaviors and in job-to-skillset matching. She regularly assists clients in employee selection, team building, training and development, motivation and incentives, internal communication structures and conflict resolution.

Her experience in executive coaching includes assisting top executives in team building, personal and team performance improvement, and overall business strategy building and strategy implementation processes.

In BCR's family business practice, Jean plays an active role in guiding BCR's annual family business research which BCR has been conducting since 2017. In addition, Jean leads the firm's efforts in creating and growing the Women Leaders In Family Enterprises organization which is a non-profit organization designed for women in family businesses who are currently in leadership positions or growing into leadership positions, to navigate the challenges, biases and preconceived notions that women must still manage through, even in family owned enterprises.

Jean embodies the entrepreneurial spirit and knows that business people care not only about bottom-line results but how they are achieved; she learned early on that objectivity is the key to helping her clients to thrive in the marketplace. By instilling this characteristic in Business Consulting Resources clients, she shows them how to navigate any trend, obstacle, or roadblock to success they may face.

Jean has always been active in the local business community. She is a past member of the Board of Business Advisors of the Nu'uuanu YMCA and the Chamber of Commerce of Hawaii. She is an active member of the national chapter of the Society of Human Resources Management (SHRM). She is past President of the Parent Faculty Association (PFA) of Punahou School and is also a past Chair of the Board of Easter Seals Hawaii.

Jean is married to Ken Gilbert, who is also her business partner. They have twin children, Kyler and Miranda, who both graduated from Punahou School. In addition, Kyler is a 2020 graduate of UCLA with a double major bachelor's degree in business economics and communication. He is working with the Capital Group, Los Angeles and will pursue an MBA. Miranda earned her bachelors in political science in 2020 from LMU, and, in 2022, her master's in literature and gender studies at The New School in New York City. She plans on obtaining a Ph.D. and pursuing her academic and writing career.



Jonathan Schreter

JONATHAN SCHRETER ('00) | EXECUTIVE VICE PRESIDENT, BOLTON & COMPANY

For the past 20 years, Jonathan Schreter ('00) 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, Schreter 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 the UCLA Anderson School of Management in 2000 and his Certified Insurance Counselor (CIC) designation from the National Alliance for Insurance Education & Research in 2010. He was president of Insurance Brokers and Agents San Fernando Valley, is the current president of the UCLA Anderson Alumni Network in Los Angeles and serves as treasurer of 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.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Olav Sorenson

OLAV SORENSON | JOSEPH JACOBS CHAIR IN ENTREPRENEURIAL STUDIES;
PROFESSOR OF STRATEGY; FACULTY RESEARCH DIRECTOR,
PRICE CENTER FOR ENTREPRENEURSHIP & INNOVATION, UCLA ANDERSON

Olav Sorenson joined the UCLA Anderson faculty in 2020. His primary stream of research pertains to economic geography, focusing on how entrepreneurship influences the growth and competitiveness of regions within countries, and on why some regions appear more supportive to entrepreneurs than others. "I was in graduate school in the mid-1990s at Stanford, in Silicon Valley, and it seemed like everybody and their brother was getting involved in a startup," Sorenson says. "That's really what got me interested in entrepreneurship and interested in 'Why Silicon Valley?' What was different about Silicon Valley than other places?"

He has called attention to unexpected consequences of the fact that social capital plays an important role in entrepreneurial success. Largely in recognition of this research, Sorenson received the 2018 Global Award for Entrepreneurship Research.

His secondary streams of research have addressed the relationships between basic science and innovation and how organizations can better learn from their interactions with customers and from their manufacturing experience.

In total, he has delivered nearly 400 research presentations and has had more than 90 papers published on these subjects, in journals such as *Science*, the *American Journal of Sociology*, the *Journal of Financial Economics*, the *Review of Economics and Statistics*, *Administrative Science Quarterly*, *Strategic Management Journal* and *Research Policy*. Sorenson serves as a department editor for *Management Science* and as a deputy editor at the *American Sociological Review*. He has also served in editorial positions at more than a dozen other journals.

Sorenson's Venture Capital Strategy course is a version of one he's taught since 2005. "My goal with that course is to do something that's a little different from the typical venture capital course, which is usually about valuation and contract terms," says Sorenson. "This course comes more from the perspective of someone who would be an active venture capital or angel investor, and some of the types of strategic decisions that are involved with that." He'll also be teaching *Entrepreneurship and Venture Initiation*, an introductory entrepreneurship course.

In addition to his research and teaching responsibilities, Sorenson joins the Harold and Pauline Price Center for Entrepreneurship & Innovation as faculty research director. In that role, he plans to build on the curricular offerings of the Price Center and create a research arm dedicated to entrepreneurial studies. Sorenson also plans to mentor student entrepreneurial teams within the Anderson Venture Accelerator and those participating in the school's Business Creation Option field study.

From 1999 to 2005, Sorenson taught strategy courses at UCLA Anderson. Prior to returning to Anderson, he held the Frederick Frank '54 and Mary C. Tanner Professorship at the Yale School of Management and, before that, the Jeffrey S. Skoll Chair in Technical Innovation and Entrepreneurship at the University of Toronto. He has also served on the faculties of London Business School and the University of Chicago, and has held visiting appointments at the Hong Kong University of Science and Technology, SDA Bocconi, Universidad Carlos III, Melbourne Business School, Singapore Management University, the National University of Singapore, BI Norwegian Business School, the Stanford Graduate School of Business and INSEAD.

Sorenson received his bachelor's degree from Harvard College and his master's and doctoral degrees from Stanford University. He has also received an honorary doctorate from Aalborg University.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Eric Sussman

ERIC SUSSMAN | ADJUNCT PROFESSOR, UCLA ANDERSON

Accepting an offer to teach as a means of earning some additional income may have been one of Eric Sussman's more auspicious decisions. Currently an adjunct professor of accounting and real estate at UCLA Anderson, Sussman first taught a certified public accountant exam review course after graduating from Stanford's Graduate School of Business and accepting a position with a small real estate investment firm. It was a role he thoroughly enjoyed. So when he was first offered a lecturer's position at Anderson by his mentor and former teacher, David Ravetch, he jumped at the opportunity.

Since 1995, 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 the Pacific Value Opportunities and Clear Opportunity Fund, which have acquired, rehabilitated, developed and managed more than 2 million square feet of residential and commercial real estate over the past 20 years. The firms' portfolio at present consists of industrial, multifamily and single-family residential, and retail properties.

Sussman is also audit committee chairman and former chair (2012-2018) of the board of trustees of Causeway Capital's group of funds (International Value, Emerging Markets, Global Value, Global Absolute Return Funds, International Opportunities and International Small Cap), which collectively have more than \$15 billion in assets. With his wide range of expertise, he 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.

Sussman relies on his real-world experiences to make his classes relatable and exciting, aspects that are not lost on students or faculty. 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 honors.

S P E A K E R A N D P A N E L I S T B I O G R A P H I E S



Elizabeth Tene

ELIZABETH TENE | PRESIDENT & CEO, ACCESS GENERAL CONTRACTING

Elizabeth Tene born and raised in Southern California. The youngest of three siblings, born to immigrant parents who migrated here from Mexico with nothing but a dream for a better future.

Her parents have always been Entrepreneurs. Every day after grade school and weekends, Elizabeth would work at her mother's "shop" from selling wedding décor or loading chairs and tables, to helping her father, taking pictures of jobsites, invoicing and everything else in between.

While other kids her age played, Elizabeth worked. As she got older, she would jokingly say that her childhood was robbed. What she would later realize is that these experiences instilled a great work ethic and prepared her for the journey ahead.

Elizabeth Tene graduated from Marina High school, and attended Golden West College. She received a double Major in Social, Behavioral Science and Humanities. She also has completed multiple courses including Turner Construction management, mastering business with So Cal Gas, and Goldman Sachs 10,000 small businesses program.

As a young adult, feeling unfulfilled with her retail and banking sector jobs she decided to embark onto something more challenging. She decided to take after her father, and join her brother in the construction industry. She has since then, never looked back. She is now President/CEO of her family business and continues to pave the way forward. Elizabeth represents one of few successful women-owned businesses in the construction industry serving public utility, federal and military clientele.

Elizabeth's accolades include: 1) Inner City 100 ranking, representing firms that drive inclusive economic prosperity in under-resourced communities by creating jobs, income, and economic prosperity for local residents; 2) Supply of the Year nominations from SoCalGas recognizing key performance on infrastructure and pipeline safety programs; and 3) INC 5000 Fastest Growing aPrivate Company ranking, highlighting the fastest growing private companies in the US.



Chris Welton

CHRIS WELTON ('12) | WEALTH MANAGEMENT ADVISOR AND MANAGING DIRECTOR, NORTHWESTERN MUTUAL

Chris Welton ('12) is a wealth management advisor and managing director at Northwestern Mutual, where he leads a team that works together with its clients to implement a financial plan that integrates risk management, wealth management, tax-efficient strategies and estate planning. Welton earned an undergraduate degree in political science, magna cum laude, from Amherst College in Massachusetts and an MBA from the UCLA Anderson School of Management, and he holds both Chartered Financial Analyst (CFA) and Certified Financial Planner (CFP) designations. He and his wife, Rosa, are avid health nuts, love to cook and enjoy having people over for lively discussions and good food.



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