



Northeastern University

Center for Family Business

Northeastern University | Center for Family Business | 360 Huntington Ave | 101 Hayden Hall | Boston | MA | 02115

CONFIDENTIAL MEMBER PROFILE

Date: _____

Company Name: _____

Address: _____

City/State/Zipcode: _____

Website: _____

Primary Contact's Name _____ Title _____

Contact's Telephone _____ Contact's Fax _____

Contact's Email _____ Cell Phone _____

Date of Birth _____ # of Years in the Business (FT) _____

Home Address: _____

City/State/Zip Code: _____

Are you the Founder?

Successor?

Acquirer?

Other family members working full-time in the business:

<u>Name</u>	<u>Title</u>	<u>Relationship</u>	<u># of Years in the Business</u>	<u>Date of Birth</u>
1.				

Email Address: _____

2.				
----	--	--	--	--

Email Address: _____

3.				
----	--	--	--	--

Email Address: _____

4.				
----	--	--	--	--

Email Address: _____

*If needed, continue on a new page

About the Company:

Year Founded _____ Annual Revenue (aprox.) _____

Years it's been in the Family _____ Current Generation _____

of Employees _____ # of Family Members in the Company _____

Brief Description of Product(s) and/or Services(s) _____

Markets Served (Industries, Locations) _____

Trade Association Membership _____

Legal form of organization (C or S Corporation, partnership, etc)? _____

Has a successor been named for the future? _____ Who? _____

Has your firm ever employed a management consultant? _____

If so, for which of the following areas:

- | | |
|------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Financial planning | <input type="checkbox"/> Estate Planning |
| <input type="checkbox"/> Succession planning | <input type="checkbox"/> Family Conflict Resolution |
| <input type="checkbox"/> Operations management | <input type="checkbox"/> Organizational Development |

Which topics would be of interest to you as a potential program?

- | | |
|------------------------------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Leadership succession | <input type="checkbox"/> Hiring and firing practices |
| <input type="checkbox"/> Ownership transfer | <input type="checkbox"/> Sibling rivalry |
| <input type="checkbox"/> Long-term planning for business | <input type="checkbox"/> Organizational relationships |
| <input type="checkbox"/> Obtaining financing | <input type="checkbox"/> Working with advisers |
| <input type="checkbox"/> Communication | <input type="checkbox"/> In-laws |
| <input type="checkbox"/> Financial equity among children | <input type="checkbox"/> Creating change |
| <input type="checkbox"/> Compensation policies | <input type="checkbox"/> Compensation policies |
| <input type="checkbox"/> Resolution conflict | <input type="checkbox"/> Development of Management Teams |
| <input type="checkbox"/> Rights and responsibilities of non-family employees | <input type="checkbox"/> Other: _____ |

What are the 3 most important issues you want to see the Center for Family Business address?

1. _____

2. _____

3. _____

MANAGEMENT ORGANIZATION

Draw or attach here a simple organizational chart.
Circle the names of all family members in management.

FAMILY TREE

Draw a simple family tree showing the generations who have been, are, and will be in the family business. Indicate names and ages.