

# The Circles of Our Lives

Women in Family Business

XXVII ANNUAL

March 9-12, 2023

Miraval Life in Balance Resort  
Tucson, AZ



Presented by

**LESLIE DASHEW**  
Human Side of Enterprise, LLC

**Well, here we are again,  
as women in families with  
businesses and assets**

**Exploring who we are and what we want**

**This is yet another opportunity**

**To take charge of our lives and collaborate  
with others**

**On that which we share**

We are evolving through time

Exploring the options

Learning new tools

Reviewing the context in which we are living

Our reflection at these moments allows us to take stock  
to consider what new directions might suit us at this point  
We have more wisdom and resources than the last time  
And It is incumbent upon us to be good stewards of these  
resources

Who, what, where, when and how:

Who are we today?

What is most important to us now?

Where do we want to be or go?

When do we take that step?

How do we use our assets and opportunities to get there?

Our family and its assets may be the context in which we live

But in order to be our best selves and be of service to others

We must first answer those questions

Then we can consider the context of our family

The business

And

The world in which we live.

**In WFB XXVII we will move through  
concentric circles starting with ourselves...**

Moving out to our nuclear family and our extended family

Moving to our business interests, personal and collective

And into our community and the world

As we explore these realms, we will identify the challenges and  
strategies

That help us evolve in our effectiveness in the family and  
business systems and the world that surrounds us.

We will take stock of ourselves

Our assets

Our family responsibilities

And the support which we have or need

**Mindfulness:** What is it I want in my life now and/or in the  
next chapter

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**Context:** Who and what is pulling me or pushing me

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**Resources:** Financial, Intellectual, Social Capital, etc

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**Organizing:** Plans, Structures, Associations

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**Engaging:** In what we want, with our people, with  
needed resources

**Leslie Dashew will once again lead our program.  
In addition, we will have two resource people who will  
offer additional expertise and perspectives:**

### **Phyllis Horner, PhD**

Phyllis is the CEO of Great Places and Spaces, LLC with offices in Las Vegas, NV. She co-founded this business with her husband. Her focus is to ensure that businesses have measurably healthy cultures, people practices, and physical environments for optimal work. She advises through use of a proprietary assessment called the Ideal Work Settings Roadmap, which ensures leaders know which innovative practices will ensure highest perceived work quality by the employees. The assessment results allow leaders to invest in the areas which matter most to the workforce, whether physical improvements or people practices. She also coaches senior executives on leading the workforce effectively in the post-pandemic world.

Her education is as an Industrial/Organizational Psychologist, from Wayne State University, Detroit. She is an expert in productivity, employee engagement, corporate values, succession practices including learning and development, adaptive change, and the role of a healthy workspace on engagement and results

Phyllis serves on the boards of family businesses and worked for a family business, responsible for succession, selection, onboarding, teambuilding and leadership skill development of the managers and executives of the company. She focuses on the measurable financial impact of improving these practices.

Phyllis just added the role of grandma to her resume this year!

### **Teri Kelley**

Teri leads wealth planning for Viewpoint Group at Morgan Stanley where she is responsible for client engagement with corporate executives and business owners. Her practice includes uniquely successful executives, entrepreneurs, and multi-generational families. Helping clients make educated decisions about their financial planning strategies has been Teri's passion throughout her career. She helpsthem identify and articulate their unique goals for themselves, their businesses, and their families.

She received her M.B.A. from Arizona State University's W.P. Carey School of Business and her B.A. in Communication Studies from the University of Alabama at Birmingham/ Teri is a current member of the Lowell Observatory Foundation Board, Northern Arizona Healthcare Finance and Investment Committees, and Forest Highlands Foundation Board. She previously served as Board Chair for the Arizona Cactus Pine Girl Scout Council and Board Member for McDowell Sonoran Conservancy

Teri and her husband Tyson have two adult children, two little boys and two Goldendoodles.

## **PROGRAM SCHEDULE**

### **Thursday, March 9, 2023**

- 4:00 PM Be at Miraval and ready to start!
- 5:00 PM Opening Event: Setting the stage and getting to know your colleagues
- 7:00 PM Group Dinner and continued Dialogue

### **Friday, March 10**

- 9:00 AM Starting from the center: what do I want?
- 11:50 AM Lunch on your own and enjoy facilities
- 3:10 PM **Context:** As part of a family what are the dynamics with which I must deal?
- 6:30 PM Group Dinner and Continued Dialogue

### **Saturday, March 11**

- 9:00 AM **Resources:** What are the assets at my disposal and how do I use them to achieve my goals?
- 11:50 AM Lunch on your own and enjoy facilities
- 3:10 PM Organizing Myself and My assets: Planning, Finding Help and Accountability
- 6:30 PM Group Dinner and Continued Dialogue

### **Sunday, March 12**

- 9:00 AM **Engaging:** Bringing it all together to make it happen!  
Closing Ceremonies
- 11:30 AM Group Lunch and Close of Program

# PROGRAM REGISTRATION

## WOMEN IN FAMILY BUSINESS XXVII MARCH 9 - MARCH 12, 2023

**Program Cost: \$1250 | Checks Payable to Human Side of Enterprise, LLC**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Numbers (day/evening): \_\_\_\_\_

E-mail: \_\_\_\_\_

*Please let us know asap if you would like to join us!*

**Please note: Room reservation cut-off is February 9, 2023**

Miraval reservation: 800-232-3969 - Identify yourself as member of "Women in Family Business Program 2023" to get special rate.

### FOR MORE INFORMATION CONTACT

Anne Zaphirio

Human Side of Enterprise, LLC | 21839 N 98TH ST | SCOTTSDALE, AZ 85255

(480) 419-4243 | azaphirio@gmail.com

### 1. PROGRAM REGISTRATION FEE: \$1250

You may cancel up to February 9 with no fee. After February 9, \$200 or we can apply full amount to next year.

### Participation is limited to 30 women.

Please complete the form on the next page and send it and your check payable to:

### Human Side of Enterprise, LLC

21839 N. 98 St., Scottsdale, AZ 85255

Telephone 480/419-4243

### 2. RESERVATIONS AT MIRAVAL:

Facility reservation: 800-232-3969 - Identify yourself as member of "Women in Family Business Program 2023" to get special rate

Room reservation cutoff February 9, 2023

### ROOM RATES:

Dreamcatcher: Single \$649.00/each |  
Double \$549.00/each  
plus 23% resort charge plus 12% tax  
Food tax 6.1%.

### INCLUDES:

- Overnight accommodations
- Shared airport transfers to/from Tucson International Airport. Book 1 week in advance
- Welcome Miraval tote and water bottle
- Three gourmet meals in Cactus Flower
- Restaurant, snacks at Palm Court
- Smoothie Bar and nightly hors d'oeuvres in Brave Bill lounge
- Full access to Resort and facilities
- Numerous group lectures on various topics, fitness classes, outdoor adventure, nutrition education, meditation and yoga
- \$100 per person, per night,
- non-transferable resort credit for select spa services.  
Call 844-277-0227 or email to book 6 weeks in advance
- Miraval is a non-tipping property

