



# JIM MOODY

Keynote Speaker | Business Strategist | Consultant | Coach

As the former president of the Construction Suppliers Association which served a constituency composed mainly of family businesses, Jim learned to understand that the biggest threat to members was failure to address family business issues like succession. The association developed programs for next-generation leaders along with programs for current-generation leaders who were trying to figure out how to depart well. While developing those programs and working with individual companies, Jim developed expertise in family business issues. This, coupled with Jim's unique empathetic-while-direct personality, makes him a valuable resource to family businesses.



**OPEN  
APERTURE  
ADVISORS**

FRESH LIGHT + SHARP FOCUS + DEEP INSIGHT



# A MESSAGE FROM JIM

When family businesses work well, they are powerful, profitable, and a blessing for the family. When they don't, they can cause a lot of pain. I have made it my career to help businesses that are not meeting their full potential, and through this, I have witnessed a lot of family pain. Sometimes the company itself causes the pain; sometimes, the family issues create pain for the business and those who work in it. So frequently, the problems are driven by generational succession.

I am passionate about ensuring the survival of family businesses by helping leaders make wise decisions that serve the company and the family well for today and future generations. Every family and family business is unique. Understanding the issues specific to each family business is critical to being able to help. There is not a formula that can be applied. It is my job to ask the tough questions, gain insight into the perspectives of all the people involved, and then create solutions that build on experience, expertise, research, and best practices. If you are facing challenges in your business or want to take things to a higher level, I'd love to talk with you about how I can help.

*Jim Moody*



# WHAT CLIENTS ARE SAYING



"Jim's presentation was insightful, educational, and extremely informative. He is a delightful person and brings the best of the best to his audience. We look forward to having him back in the future!"

**Dale Mercer | President, Allied Building Stores, Inc.**



"Working with Jim was one of the best decisions I made. He helped me gain clarity and focus and allowed me to make informed steps instead of guessing and hoping I made the best career decision."

**Anonymous Business Owner**



"Thank you for coming and helping us have a breakthrough day. We can see that the old model of our company's progression will not work. We are now discussing NEW future plans!"

**Anonymous Business Owner**



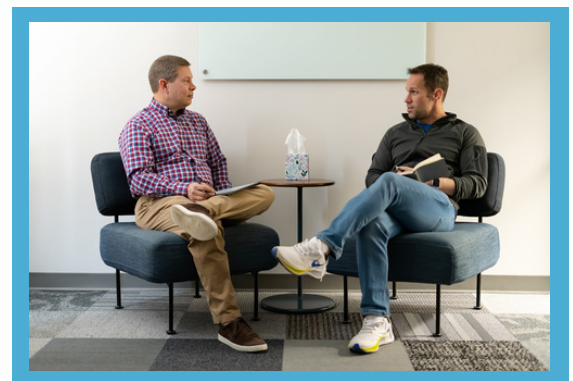
"After an in-depth analysis of our business, goals, and individual personalities, Jim developed a two-year strategic plan for our company. His ability to facilitate an open and transparent discussion among owners and family members is truly a gift."

**Anonymous Business Owner**



**OPEN  
APERTURE  
ADVISORS**

FRESH LIGHT + SHARP FOCUS + DEEP INSIGHT





## Packages

### Keynote:

#### *Why Family Businesses Fail, and How You Can Avoid Being a Statistic*

Most family business owners are aware of the statistics showing that very few family businesses survive into the fourth generation. What most people don't realize is that there are just a handful of causes for these failures, and they are entirely preventable. Learn those reasons for failure and gain actionable tips to build defenses and ensure your family business survives for generations to come.

### Workshops:

#### *Two Day Strategic Planning Workshop*

Provide your company with a meaningful way forward. Mission, vision and values, followed by internal and external environmental scans. Together, we create a map for making your organization stronger.

#### *Family Business Succession Planning*

Ensure continuity and success in family-owned businesses. We help the current generation understand when and how to step away from the business with a positive and meaningful legacy and work with the next generation to prepare them for ownership and leadership.

### Coaching:

#### *Reach Your Business Goals*

Whether you feel stuck, frustrated, face a challenge you don't know how to unpack, or simply want to improve your game, coaching provides the help you need to get you where you want to go. It works for business owners and for key employees as well. It can also be useful in helping people in conflict resolve the situation and understand each other better. Coaching can be done via video call.