

# L3 LIVES OF LEADERSHIP & LEGACY MEMBER NEWSLETTER

FALL 2013

ISSUE 3



## FROM THE CHAIRMAN

Recently, I was observing the Harvest Moon, the last full moon of the summer. It signals the farmers that there is a final opportunity to bring in the crops before the first frost.

What an incredible night vista a full moon provides. I love being out late in the evening or early in the morning in a spot without city light pollution and seeing the natural light at a time of day that is normally not available to me. To see what is going on when the rest of the world is sleeping.

Well, let me be your L3 Harvest Moon. Let me share that your Board and Committees have been in the fields both day and night. They have been busy behind the scenes and have prepared many content venues for members to participate in. Their charge has been to provide opportunities that "money cannot buy" for our members. One great example of that are our Prime Time venues. They are expanding in both

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## A SNEAK PEAK AT WHAT'S IN STORE FOR L3 IN 2014

By now you should have received the catalogue for L3's 2014 events. We have a great calendar lined up and hope you will make plans now to attend one - or two, or three, or all - of these remarkable experiences.

First up is the Imagine Solutions Conference in Naples, Florida on February 24. This year's program "Brilliant Minds! Big Ideas!" will host 24 of the nation's most brilliant thought leaders and innovators for seven sessions to discuss ideas and events that will shape our future. Topics include: What Can We Learn From Genius?; What Can We Learn From History?; Revolution in Education; Amazing People Under 20; National Geographic;

The Future of Exploration; Global Perspective: BBC Presents Africa; and Leadership and Inspiration.

L3 members are invited to a VIP reception with speakers on Sunday, February 23. Then, we will attend the conference together on Monday and have a private closing session on Monday evening.

Then it's time for the annual L3 Retreat, April 30 through May 4. We are headed to Boston for a powerhouse lineup of experts from McLean Hospital, recently named #1 psychiatry hospital in the country by U.S. News & World Report. We will also meet and chat with leaders from Harvard University and representatives from Spaulding Rehabilitation Hospital.

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Back by popular demand, L3 will return to Ensenada, Mexico from May 23-26 for another family purposeful travel trip with Homes of Hope.

This program selects a family - usually one with children - who are in desperate need of a real home. Last year's family lived in a one-room, dirt-floor hovel. In two days, L3 members and their families will build a house for this family in need. Bring your kids, grandkids, parents, and yourselves and come for this truly rewarding and gratifying experience.

Next, we are pleased to offer an international purposeful travel trip, The Roots of Rome, May 31 to June 6 in Italy.

Part one of our trip will look at the Etruscan Spiritual Connection at the necropolis in Tarquinia and Vulci National Archeological Park. Part two takes us to Viterbo to examine the Jewish Kaballah Spiritual Connection and Part

three explores the transition to Christianity in Rome.

We will explore ancient villas, the language and character of Rome and, of course, enjoy some outstanding food and wine. We will end our trip with a private, guided tour of the Vatican.

In years past, the Women's Getaway has been such a smashing success that the men have been clamoring for one of their own. Men, consider this your personal invitation - don't let the women have all the fun! This year, Men's and Women's Health Getaways will occur concurrently, but separately, from September 18-21 in La Jolla, California, just north of San Diego.

We are working with Scripps Integrated Medicine to create a program that will evaluate your personal health and wellness and provide guidance and resources for improvement.

The men and women will have separate programming, activities and meals tailored to their specific

needs, but will come together for the opening and closing receptions. Many thanks to **Walter and Lola Green**, who secured a fabulous location for us to stay at Rancho Valencia in Rancho Santa Fe.

Finally, in October we head back to the Eastern seaboard for a purposeful travel trip that examines the devastating effects of Superstorm Sandy. From October 30 to November 2, travel to New York City and the Jersey Shore where you will meet with government leaders and relief workers to discuss what happened on the ground during the recovery process. We will also speak with victims about what happened before, during and after the Storm, and what we can learn from their experiences.

Between these six events, 2014 should prove to be a full and rewarding year for L3. Mark your calendars now and plan to attend.

We encourage you to make a deposit or register early. By making



a deposit, you are guaranteed a spot until the refundable deadline. At that time, you will be charged the balance of the early registration price, or you can cancel your reservation and the deposit will be refunded. It's a great option if you really want to go, but are not able to make a commitment just yet.

Also new this year, you can save by registering early. Please refer to the schedule below for prices and registration deadlines.

To make a deposit or register, please call Cis Myers at 512-900-4477 or email her at [cm Myers@L3.org](mailto:cm Myers@L3.org). More details and agendas will be added to individual event pages on the L3 website ([www.L3.org](http://www.L3.org)) as they become available.

If you are mailing your registration form, please note that L3's mailing address has changed: 1015 Bee Cave Woods Drive, Suite 207C, Austin, Texas, 78746.



<i>Register early and save</i>	<i>Deposit (refundable until)</i>	<i>Early Registration (deadline)</i>	<i>Registration (effective date)</i>	<i>Registration includes:</i>
<b>Imagine Solutions Conference</b> Feb. 23-25, Naples, Florida	<b>\$125</b> (11/23/13)	<b>\$996</b> (1/10/14)	<b>\$1,200</b> (1/11/14)	Conference fee and 4 meals
<b>Spring Retreat</b> April 30-May 4, Boston, Mass.	<b>\$220</b> (1/14/14)	<b>\$2,200</b> (2/14/14)	<b>\$2,400</b> (2/15/14)	All activities and meals
<b>Homes of Hope</b> May 23-26, Ensenada, Mexico	<b>\$160</b> (3/11/14)	<b>\$1,595</b> (4/11/14)	<b>\$1,800</b> (4/12/14)	Building supplies, hotel in Ensenada, meals, activities
<b>Roots of Rome</b> May 31-June 6, Rome, Italy	<b>\$500</b> (1/29/14)	<b>TBD</b> (3/29/14)	<b>TBD</b> (3/30/14)	Hotel, meals, activities, transportation within Italy
<b>Women's &amp; Men's Health Getaways</b> Sept. 18-21, La Jolla, Cali.	<b>\$150</b> (5/18/14)	<b>\$1,595</b> (8/1/14)	<b>\$1,800</b> (8/2/14)	All activities and meals
<b>Superstorm Sandy Recovery</b> Oct. 30-Nov. 2, Jersey Shore and NYC	<b>\$190</b> (7/30/14)	<b>\$1,895</b> (9/19/14)	<b>\$2,200</b> (9/20/14)	All activities and meals





## GREAT ART AND A FEW SURPRISES

From June 20-23, L3 members enjoyed a relaxing and educational trip to Santa Fe for the purposeful travel trip, “A Life of Art.”

One of the highlights of the trip was a tour and dinner at the home of Lois Ellen Frank, a Native American professional chef who is working to return Navajos to an indigenous diet. Lois has a Ph.D in Culinary Anthropology and focused on the importance of corn in the diet of Indigenous tribes throughout the Americas.

“Lois Frank’s hospitality and introduction to Native American cuisine based on the ingredients available long ago were really engaging,” said Ann Stuart Kling. “Especially when the wine began to flow!”

Members learned about advances in Native American Arts and Culture at the Institute of American Indian Arts, the nation’s only 4-year fine arts degree institution devoted to contemporary Native American and Alaskan Native arts.

“At IAIA [we heard] how isolated some of the Native American young men and women are today, even with our communication options,” Bill Kling said. “For example, some of the teenage boys didn’t know what mayonnaise was because the government didn’t supply it like they did mustard, ketchup and cheese. Exposure like this really makes you want to help in some way.”

Saturday was spent leisurely exploring the abundance of amazing art on Museum Hill, followed by a private evening at the home of Jeanne and Mickey Klein.

“All the art at the Kleins’ home was great, but the biggest surprise might be the push broom in the bathroom that is studded with precious stone made to look like paint splatters,” Bill Kling said. “Didn’t see that one coming!”

Thank you to the Kleins for welcoming us to their home and to Anne and Loren Kieve for their expertise and efforts in making this trip such a dazzling success.

“I would say we were a very convivial group,” Ann Stuart said. “I would do that trip again in a heartbeat!”



# NEW MEMBER PROFILES

Please welcome these new members who joined through Oct. 1, 2013



**FRANK & NINA SEELY**  
Austin, Texas

As President of Seely & Co., Frank provides consulting and business strategies for mixed-use

and shopping center developments. Seely & Co. is a community partner that brings together the best resources, information and technology to achieve success.

Until 2012, Nina was the General Manager of Austin's flagship Ralph Lauren store where she worked to align the brand with clients and the community to benefit both local nonprofits

and the company. The store achieved record sales and Nina and her team were honored with two "Big Idea" awards. Nina was recognized as "Innovator of the Year" in 2009. She has also created unique partnerships for Saks Fifth Avenue, Fred Joaillier, Cellular One and Austin Title Company.

In 2012, Frank and Nina combined their years of local business experience and social

connections to start Trento 360, a fresh and casual Italian restaurant. Last year, they created "Dining to Give." Through this program, a portion of each check every Monday night is donated to a local charity.

Frank is a board member and volunteer for The Rise School, a nonprofit organization providing early childhood education for children

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## PAT & JOYCE COUGHLAN, Naples, Florida

Pat, President and Founder of Conflict Solutions, is one of the most experienced and successful mediators in the country and one of the few with substantial multi-party construction, catastrophic case, mass tort and insurance coverage experience. He has mediated over six billion dollars worth of cases and travels throughout the world to help settle complex and difficult disputes.

Prior to Conflict Solutions, Pat was a Partner with Richards, Watson & Gershon in Los Angeles and previously Alley Maass, Rogers, Lindsay & Chauncey in Palm Beach. He also served as a Judge in Ocean Ridge, Florida. A Judge Advocate with the US

Air Force, he is a graduate of Duke University and Duke University School of Law.

Pat has served as a trustee for the North Yarmouth Academy, World Affairs Council of Maine, Natural Resources Council of Maine, Portland Stage Company, Susan Curtis Foundation, Gulf Stream School and Mountains Restoration Trust. He has also served in various positions with the Maine Youth Camping Association, League of Women Voters, Our Lady of Perpetual Help in North Windham, University of Southern Maine, and as a recruiting representative and advisor for Duke.

Joyce hails from New York, born in Buffalo and



raised in the suburb of Amherst. She earned a Bachelor's from Daemen College and a Master's from SUNY University. She also attended the Graduate Realtor Institute.

She began her professional career as an elementary school teacher at schools in New York, California, New Hampshire and Nigeria. After retiring from teaching, she became a corporate trainer for McGraw Hill Co. before



moving into real estate as a Partner/Broker for Sotheby's Real Estate Firm, Town & Shore. Currently, she is president of Atlantean Consultants.

Joyce has served on numerous boards, including Junior League of Portland Maine, Maine Concert Association, North Yarmouth Academy, World Affairs Council of Portland, Greater Naples Leadership, The Planning Board of

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### JIM & DEBBIE HERTWIG Petaluma, California

Jim brings over 40 years of freight transportation experience to his position as President and Chief Executive Officer of Florida East Coast Railway, L.L.C. Previously, Jim served as President of CSX Intermodal, Inc. for six years and he spent nearly nine years as President of Landstar Logistics.

Previously, Jim served as President and CEO of Carolina Freight Carriers Corporation and also as Chairman and CEO of Red Arrow Freight Lines, two large regional LTL carriers. Before that, he was President and CEO of Con-Way Intermodal.

Jim serves on the Board of Directors of the Intermodal Transportation Institute at

the University of Denver and recently concluded his third term on the Board of Directors for the Intermodal Association of North America. He serves as FEC's representative to the Board for the Association of American Railroads.

Debbie has been the sole owner of DSB, Inc. and Cobalt Transport Services, Inc. for 20 years. These companies specialize in the consolidation and transportation of premium wines and spirits from California to wholesalers in states east of California. In 2003, she co-founded Winestar Logistics, a transportation management software company designed for the wines and spirits industry.

For six years, Jim and Debbie lived near his corporate headquarters in

Jacksonville Beach while Jim traveled extensively and Debbie commuted to California. Last year, they bought a small farm outside Petaluma.

Jim is very active in fundraising for United Way, St. Jude's and Toys for Tots. For the last three Christmases he has run a Santa Train from Jacksonville to Miami that stops all along the way dispensing toys, gift bags and treats to the children who gather to have their

pictures taken with Mr. and Mrs. Santa (aka Jim and Debbie). Last year, the employees of the FEC and Jim raised over \$115,000 worth of toys. Every December the Hertwig clan gathers in Memphis to participate in the St. Jude's marathon, half marathon and 5k run. Last year, Team Hertwig numbered 33 family members ranging from age 2 to age 72 and raised \$20,000 for St. Jude's while participating in the various races. *Cont. on page 18*



### TONY LAOS & ANDRA BROOKS Austin, Texas

Tony Laos is a former senior executive in two Fortune 500 companies, entrepreneur and adventurer. His cultural awareness, commercial mindset and economic understanding are the foundation for several successful business start-ups in the

United States, Brazil and Iraq. In 2002, President George W. Bush appointed him to the Board for International Food and Agriculture Development. Currently, he is on the board of the Conflict and Development Foundation which is associated with the Howard G. Buffet Foundation. He works as an International Development Specialist for Texas A&M University that takes him to fragile state countries throughout the world. Though a proud native of Arizona with a heritage dating back to the 1600s, Tony now calls Austin his home.

Andra is a business psychologist who is a trusted advisor and coach to CEOs and senior

leaders on topics related to leadership effectiveness, senior team alignment, succession and strategic talent management. She has successfully combined her love of travel with her professional endeavors abroad having lived in the Middle East as well as worked with clients in Latin America, UK, Europe, Africa and India. She is an experienced facilitator and assessor and speaks on the topics of leadership effectiveness, women leaders and coaching. A native Texan, Andra has settled back in Austin with her husband. Now that her peripatetic life has come to an end, she is looking forward to building deep roots in the Austin community.



SUE MCMILLIN & BILL NEYLAND, Austin, Texas

Sue has served as President and Chief Executive Officer of TG, a nonprofit corporation that promotes educational access and success so that students can realize their college and career dreams, since 2004 and has worked in the field of nonprofit management related to higher education for over 19 years. Sue joined TG in 1993 as Vice President of Operations and in 2002 was promoted to Senior Vice President for Customer Relations and Business Operations.

Before joining TG, Sue worked for Guaranty Federal Bank for 11 years, beginning in the marketing department. She worked in retail operations managerial roles for nine of those years, including Assistant Vice President of Retail Services and Vice President and Director of Deposit Operations.

Born in Cleveland,

Ohio, Sue grew up in Midland, Michigan and is a graduate of Midland High School. She attended St. Edward's University in Austin, TX, graduating summa cum laude with a bachelor's of arts degree.

Sue serves on the Board of the National Student Clearinghouse and as the Chair of its Finance and Audit Committee, on the Board of the National Council of Higher Education Resources (NCHER) and is the current President of the National Association of Student Loan Administrators (NASLA). She previously served as a Board member for ELM Resources. She has also served as past Board Chair of the United Way of Williamson County and remains actively involved as a Board member. Sue has served as a member of the Board of Visitors for Southwestern University since 2005 and is a

member of the Austin Chamber of Commerce's Federal Advocacy Council.

Bill currently owns and operates a small telecommunications consulting firm focusing primarily in the K-12 education and SMB markets. Previously a principal in a large consulting firm, Bill not only managed the operations of the firm, he also consulted for clients that included international companies, energy companies, large K-12 school districts, state-wide university systems, airports, large private and public hospitals, technology companies and nationwide developers. His international experience includes projects in Eurasia and Southeast Asia. Bill started his technology career in 1982 as a field service engineer for Capitol Computer Center, expanding to telecommunications where he managed nationwide networks supporting multiple financial offices.

Born in Venezuela to a Mexican national and a Texan, Bill and his family then moved to Houston where he grew up. During his intermediate schooling in the early

1970s, he discovered computers, which he found fascinating, unaware at the time that technology would become a lifelong passion. Later in his youth, Bill volunteered with Amigos de las Americas providing vaccinations to children in the Dominican Republic, further developing multicultural awareness and leadership skills. He later moved to Austin to attend the University of Texas. He found the laid-back lifestyle Austin had to offer irresistible and chose to make Austin his permanent home.

Bill is a father to two wonderful young ladies who are now grown and a grandfather to two young grandsons. In leisure, he enjoys golf, sailing, cycling, tennis, gardening and other outdoor recreation. He also enjoys cooking, wine, craft beer, dining exploration and travel. He still takes pleasure in assisting others and currently volunteers his consulting for the United Way of Williamson County.





## FROM THE BLOG

The L3 Blog, [www.L3blog.org](http://www.L3blog.org), is updated regularly with organization news and announcements as well as features about our members. Here are a few of this quarter's highlights.

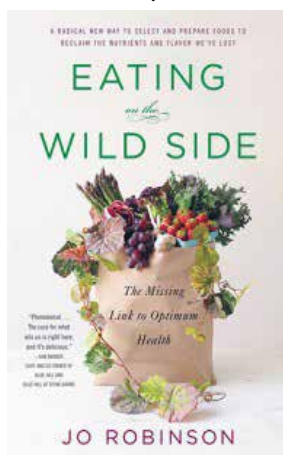
### BOOK RECOMMENDATION: EATING ON THE WILD SIDE

Recently, Austin members met at the home of Mike and Jenny Lambert for a discussion on Super Foods. For those who attended, or anyone who might be interested on the subject, Kim Smith recommends reading "Eating on the Wild Side" by Jo Robinson. Kim says:

"It is an outstanding book about how to maximize your intake of protective phytonutrients with tips on shopping, selecting, prepping and cooking. It has cutting edge, very well-researched information and would be a great adjunct to the information that we got at the meeting. I am only about 70 pages into the book and I have already been amazed at what I did not know about food. Here is an example: Cutting or tearing Romaine lettuce a day before eating it doubles

its antioxidant content. The book is loaded with tips like that. I highly recommend the book for all of us that are trying to eat as healthfully as possible."

Find it on Amazon or at your local book retailer.



### BERNS FUND SUSTAINABLE "STUDY LOOP"

Laguna Beach members Michael and Tricia Berns, long-time environmental advocates, recently donated \$1,000,000 for the creation of the Berns Environmental Study Loop within Crystal Cove State Park.



A Wall Street Journal article about the donation calls it "The largest educational gift donated to California State Parks and the first gift that creates not only capital improvements but also sustainable funding for an onsite educator."

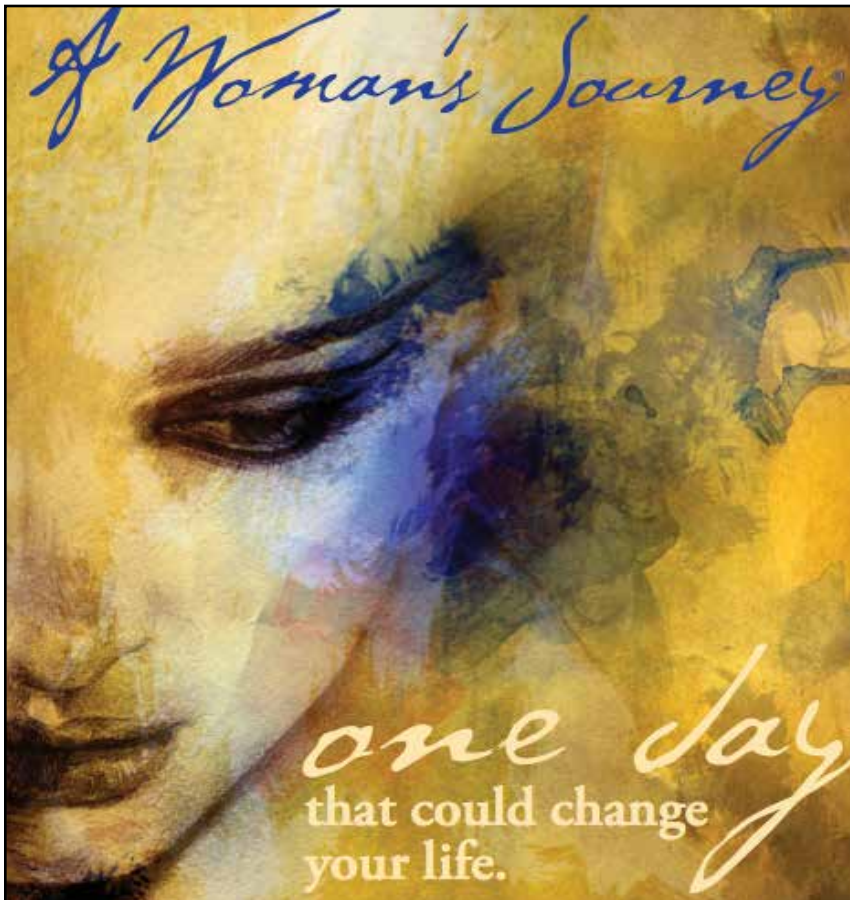
According to the Laguna Beach local newspaper, the *Stu News Laguna*, the study loop will be:

*"a half-mile of mini-field stations where visitors can perform valuable and educational 'citizen science' endeavors... Whether the visitor is a child on a school field trip or a recreational hiker curious about the natural surroundings, the study loop promises to deliver unique learning experiences and an opportunity to help the Park understand the ecosystem."*

Michael and Tricia are quoted on how important they believe it is that children learn about protecting the environment.

To read the two articles please visit *Stu News Laguna* or *Wall Street Journal* (links available on [www.L3blog.org](http://www.L3blog.org)).





### WOMEN'S HEALTH CONFERENCE AVAILABLE

L3 Health & Wellness Alliance Partner Johns Hopkins would like to invite you to attend A Woman's Journey, an award-winning women's health conference. The event takes place November 16, 2013 from 8:15 a.m. to 4:15 p.m. at the Hilton Baltimore Hotel. Choose from 32 seminars taught by top Johns Hopkins physicians and enjoy a keynote speech from Katie Couric. For more information and registration call 410-955-8660 or visit [www.hopkinsmedicine.org/awomansjourney/baltimore](http://www.hopkinsmedicine.org/awomansjourney/baltimore).

### HAPPY 40th ANNIVERSARY TO THE JONASES

On Monday, July 29, Roz and Gary Jonas celebrated their 40th wedding anniversary. They were married at Tavern on the Green in Central Park and Gary says: "As you can see, it wasn't traditional wedding attire..."

Congratulations, Roz and Gary and here's to many more great years.



### BILL MASTERS' NEW BOOK



Bill Masters has a new book out, his first for young entrepreneurs, "The Process of Focus Forum: Peer-Assisted Learning & Development." Amazon's description of the book says:

"When forum works, it is life changing. When it doesn't, forum can be a frustrating waste of time. The key to success is having a sound process. Focus Forum™ is a proven process that represents best practices for maximizing the benefits and minimizing the risks of forums. Focus Forum is different than other forum processes in several ways. First, Focus Forum is designed specifically for entrepreneurs. Focus Forums by design move very fast, so members get more done in the same amount of time as members in other types of forum. As a result, Focus Forum provides the highest possible value and benefit for members. And finally, Focus Forums are self-run – they rely on the mutual commitment and responsibility of all members to make the forum work. The Process of Focus Forum is a guidebook for building and maintaining an effective forum. It outlines a simple yet powerful method that can be followed by any forum, including: members' roles and responsibilities; ground rules for building mutual respect, commitment, trust and confidentiality; the structure and format of forum meetings; areas to avoid in order to prevent potential problems; and ways to leverage your forum experience to maximize your personal and professional success."

If you know of any young entrepreneurs (or you're interested yourself!) please take a moment to check out his book.



### ON THE RECORD WITH GARY SHILLING

By Mike Regan

Probably one of the biggest concerns we all have in running a business is the economy and the impact it will have on what we are trying to accomplish. Every couple of months I interview award-winning economist Gary Shilling to get his insights, and I recorded this interview as

part of the TranzAct On The Record series. I have already received some very positive responses, and one of my associates told me: "Everyone should listen to this." So with that thought in mind, I'm passing along the link, so you can also listen and benefit from what Gary had to say. As usual, I welcome your feedback.

Here's the link to the interview: <http://www.tranzact.com/resources/on-the-record/2013-08-gary-shilling.html>

Visit [www.L3blog.org](http://www.L3blog.org) for the audio and a link to Mike's On The Record series.

### COULD A SMARTPHONE BE THE FUTURE OF MEDICINE?



Health and Wellness Chair Charlene Madison Cassidy recommends this video from NBC's Rock Center with Brian Williams.

#### **iDoctor: Could a smartphone be the future of medicine?**

One of the world's top physicians, Dr. Eric Topol, has a prescription that could improve your

family's health and make medical care cheaper. The cardiologist claims that the key is the smartphone. Topol has become the foremost expert in the exploding field of wireless medicine. Dr. Nancy Snyderman reports.

Visit [www.L3blog.org](http://www.L3blog.org) for the video and a link to the story.



### HAPPY 50th ANNIVERSARY TO THE GREENS

On June 30, Walter and Lola Green celebrated their 50th wedding anniversary in Rancho Santa Fe. Lola writes:

"It was a beautiful night indeed, with 115 friends and family from around the country flying in for our special evening. We decided since so many were flying in



from all over, we really wanted to make it special so we brought in the most incredible couple from Los Angeles who have starred on Broadway in many major shows and they showered everyone with their majestic voices, singing our favorite love songs for a spectacular presentation. Then we had hot air balloons flying overhead that truly dazzled everyone, followed by an amazing dinner created by

San Diego's most famous chef, [Jeffrey Strauss], the owner of Pamplemousse Restaurant. It was an evening that brought a great many people to tears and for us, a great deal of joy to make this so memorable and special for those in attendance."

Congratulations, Walter and Lola and all the best.



# FAMILY SPOTLIGHT

This section features resources and information that promote our core value of Family and Relationships. Further resources can be found on the Family section of the L3.org



*Bonnie Milenthal  
Family & Relationships  
Committee Chair*



## THOUGHTS ON HAVING A FAMILY MEETING

Al and Kathy Nagy are passionate about family meetings.

They say that family meetings are essential for anyone with a family business or family holdings, but are also critical for more personal reasons as well.

"It's important to discuss family issues like 'Why dad doesn't get along with daughter-in-law X' or 'Why so-and-so never comes to Thanksgiving,'" Al said.

"It's helped us get to know our children as fellow adults," Kathy said. "Sometimes, we operate on assumptions about each other (i.e. our kids are happy in their jobs) and sometimes we find that something is wrong."

Family meetings, or retreats as the Nagys call them, allow these issues to come up in a safe place where everyone can be open and honest. The end result? The family grows closer together.

The Nagys have provided this outline as a guide to getting started. They stress that it is not the perfect or only way to hold a family meeting, just what has worked for them.

### 1. Consider the Environment

Don't hold it in an office. People go into "business mode" instead of "relationship mode."

Don't hold it in a family member's home. It's important it be held on neutral territory to make each member feel more equal.

"Once we held our family retreat at the family home in Wisconsin," Kathy said. "It's a property we all enjoy together."

"But the kids said after, 'Let's not do that again,'" Al said. "It's not neutral ground, it's 'sacred ground.' They wanted to keep it a place of relaxation and fun."

Do take the opportunity to make it a fun and enjoyable trip. The Nagys have done previous retreats in Park City, Sedona, Rancho Bernado and in wine country.

Do have the family all under one roof. Kathy recommends rentals properties from VRBO (Vacation Rental By Owner). Unlike a hotel, it has areas for everyone to comfortably gather - like a living room and kitchen - instead of everyone being in individual rooms.

### 2. Planning and Logistics

The Nagys say it works for them to have one family retreat per year, but recognize that may not be possible for every family. Take into account each family member's personal finances and work schedules and find something that works for everyone. Don't hold it unless everyone can attend. Plan for 2-3 days so there is plenty of time for "business," fun and interaction.

Al and Kathy fund the retreats for their family. That means they pay for the vacation rental, food, activities, airfare or gas, and have even compensated children for work days missed.

"We can afford it and they are making a real sacrifice to be there," Kathy said. "We started when they were younger and it became understood that we'd take care of it. But we'll adjust as we go and according to how we're doing."

That doesn't mean others aren't involved in the planning. Get other family members to take on some of the responsibilities of the planning, such as finding a place to stay, picking the fun activities, making restaurant reservations, etc. so they

feel a sense of ownership.

Be prepared - Provide each member with retreat folders that include agendas, suggested assignments, division of labor and attire. At the retreat, provide paper and pens for taking notes and have easel-size Post-Its and markers.

### 3. Set an agenda

Make sure everyone knows ahead of time what topics will be discussed and what activities are planned. Al says that at their first family retreat, he and Kathy picked the topics. At this last retreat, they only picked one and the children chose the rest.

"Talk about what *they* want to talk about," Al stressed. "It's not a lecture. That's not the point. Get them involved. Ask 'What are your questions?' Eight years later, we still haven't gotten to all the questions on our daughter's list."

Kathy notes that often the topics aren't fun ones, and that's where offsite activities come in. Plan to spend the morning on the issues and spend the afternoon having fun.

"Without the fun, I don't know

if there'd be as much enthusiasm," Kathy said. "But they all agree there's definitely value to the discussions."

### 4. Rules

Don't make any assumptions. Decide as a family on rules and put them in writing.

In order to create a safe place for sharing, emphasize confidentiality at both the beginning and end of the retreat.

"What is shared here will stay within the confines of this retreat," Kathy said. "This allows us to be open, transparent, honest and forthcoming."

Other rules can be more general. The Nagys' rules encourage members to be kind, civil, and seek for good outcomes.

"We use 'I' expressions instead of 'you,'" Al said. "Instead of 'Here's what you should do,' it's 'If I was in that situation, here's what I would do.' It's about respecting the other person and trying to understand their different background.

### 5. Integration of in-laws

This personal issue is one that each family must decide individually.

"We really enjoy the input of our daughter-in-law," Kathy said. "She offers somewhat of an outside perspective, but it's also a way to embrace her as part of the family."

If there are sensitive issues involving family finances or business that you would rather keep private, make arrangements ahead of time for other activities to be held during that time.

### 6. Pre-retreat assignments

One way to help prepare for a retreat is to complete some simple assignments that can be discussed together. The Nagys suggest completing personality tests, writing Love Letters, or bringing photos or other memories.

Al says that Love Letters is a concept their daughter, Annika, came up with. Each member of the Nagy family wrote a letter to each other member telling them why they are special and loved.





"We read them aloud to each other and everyone responded," Al said. "We had scheduled 90 minutes for this activity, but it ended up taking all morning and beyond. It set a loving tone for the retreat."

## 7. Ice Breakers

Get everyone more comfortable before you start with a few fun games. For help getting started, check out *The Ungame* or *The Book of Questions*.



## 8. Topics

Below are just a few possible topics you might cover at a family retreat. The Nagys recommend picking one or two per retreat.

- Personality profiles
- Family History
- Traditions/rituals
- Life lines - Sharing of life stories, with events and people that have had a major impact
- Family economic status
- Family business, assets, benefits, properties, investment companies
- Safety nets
- Estate planning and Trusts
- Family partnerships
- Taxation
- Gifting
- Durable Power of Attorney
- Who gets what (personal property)
- End planning - how do you want your life celebrated?
- Legacy
- Generosity
- Love letters

- Health
- Alcohol/Addictions
- Depression
- Networking
- Personal goals and plans (1-year, 5-year and Action plans)
- Bucket lists
- Personal and Business updates
- "A day in the life of..."
- Wishes and dreams
- Picture "show and tell"
- Societal impacts on family's future
- What I wish I could have told myself at 18
- The joy of play/Balance in life
- Bring in outside resources for presentations (ex: estate attorney, tax attorney, health specialists, family counseling, family member's expertise)

## 9. Have fun

As mentioned earlier, Al and Kathy recommend offsetting the gravity of the topics with fun activities. A few suggestions:

- Cooking Class
- Ballooning
- Hiking
- Biking
- Boating
- Jeep rides
- Sport shooting
- Oktoberfest
- Skiing (snow and/or water)
- Golf
- Horseback riding
- Spirit guides/Readings
- Fishing - ocean/lake/fly
- Photo Sessions
- Wine tasting
- Antiquing/thrift shops
- Spa treatments
- Charitable projects
- Concerts
- Theatre or comedy shows
- Guided tours

## 10. Room gifts

The objective of room gifts is just to make the family retreat even more fun and something to serve as a reminder after the retreat is over.

"It can be anything - colored beads, tie-dyed shirts, one year we gave everyone e-readers," Al said.

It also adds another inducement to come. Kathy says that the kids look forward to wine country retreats now because they will receive a wine budget as a room gift.

One year, the agenda was about family estate planning. As that year's room gift, Al and Kathy brought in a family estate attorney and had him do estate plans, living trusts and health directives for everyone.

Says son Lucas Nagy: "Life is easy when you ignore the uncertainty, but it gets really hard when you suddenly have to deal with it. We have minimized our uncertainty by choosing to live with awareness of our future challenges ... Any of us could die tomorrow and the legacy each of us would leave would not have an ounce of resentment, as we have shared the most crucial truths of ourselves and prepared together for the future."

If you couldn't tell, Al and Kathy have spent countless hours planning and thinking about family retreats, collecting resources, and honing their approach. They encourage any L3 member who is interested in planning a family meeting to call them at 949-496-4545.

"We are happy to be resources - call us!"

## MEMBER PASSIONS

This section features topics and causes L3 members care deeply about and how they are involved in these areas.



*Ken Gladish  
Generosity & Giving Chair*



### How did your love of contemporary art begin?

My father was a retailer and an importer/exporter in Tribeca. As a girl, we had to work Saturdays to help out with the cash registers. Many artists frequented the shop and I would be fascinated by the art personalities that came in - fascinated by creativity. Famed sign-painter James Rosenquist became a friend. Just knowing these artists sparked my interest and I started going to museums at a young age. I have no artistic talent myself, so I'm in awe of artistic talent.

### What took that awe and curiosity to the next level?

I was in college in 1967 and read that the Arno River had overflowed and Florence was flooded. It was a call to action - they needed students to help with mudding and cleaning up the art treasures. Nobody in my family had been to Europe but I made this impassioned speech to my father about how I had to be there on so many levels - how useful I could be in the humanitarian effort, how it would be a fantastic experience, and, most importantly, how I could learn more about art, opera and restoring treasures. I ended up spending a year away from home and it changed the course of my life.

### How so?

It informed my global view on politics. The world opened up and I saw that different cultures think in different ways. People are people, but every country has different mores. I couldn't just see the world through the lens of an American kid anymore. This knowledge is now applied to my work. I don't go in thinking I understand how a business works, but instead dissect it to learn how its strategies and day-to-day are different.

### How else has your love of art impacted your career?

It incorporates much that I learned. As I look for talent, I look for character, innovation, and creativity. The work of a leader is like that of a curator. It's not just one individual piece of art, but how you put them next to each other so they can heighten one another and tell a story. That's how I see companies. It's not about the individual talent, but about putting them together in a way that the sum of the parts is greater than the whole.



### Q & A WITH... DANA ARDI

*Dana Ardi is a leader of the human capital movement, distinguished by her expertise in the executive coaching and recruitment field. She is Managing Director and Founder of Corporate Anthropology Advisors, working to advise and transform businesses through people. She lives in New York.*



### **What is your involvement with the art world today?**

Besides being an avid collector of contemporary art, I am an officer for the Creative Arts Council of MoMA. I work with the staff on programs and acquisitions. I'm on the leadership council for the New York Foundation for the Arts and I'm a member of the Royal Society of Arts (U.K.). I am also an advisor for ArtSpace, a fabulous online marketplace for contemporary art. One of my joys is to expose young people to the joys of living with contemporary art and to help get them started with collecting.

### **What advice do you give to those who are just getting started?**

First, go to see every gallery in every city you can. Most offer courses with great content. Read all the contemporary art magazines you can. Join museum groups. Be intellectually curious, but keep in mind that there is good art at every level. People think it's a hobby for the elite, but it's not about the economics, it's about finding joy in finding things you love and understanding the creative process.

### **Why is art so important?**

For me, it's a transformative experience almost like meditation. It heightens and enlightens in ways that take us out of our day-to-day preoccupations. It reflects our times and what people are thinking about. It has the ability to inform, relax, and cause you to see things in a different way. It provides you an opportunity to go back to your day-to-day with fresh energy and new ideas.

### **How do you mix art and business?**

I take CEOs out of the office to look at abstract art. They say "I see chaos" and I tell them "No, that's all planned. That's strategy well executed." It gets them to look at the next level. They think they know what they see, but it's not always the obvious - it's what's embedded around the obvious. They may think that they're not being productive [visiting art museums], but it's giving their unconsciousness a chance to see things that will bubble up to their consciousness.

### **You have a new book that talks about some of these experiences. Tell us more about that.**

I have worked with hundreds of executives from all different industries. I have found a restlessness about the way things are organized, the very hierarchical nature of organizations. I was curious about how and why it came about that there is usually one central leader and a ladder of success. I realized it's a myth that there's only one way to organize in groups and I explore this in my book, *The Fall of the Alphas*.

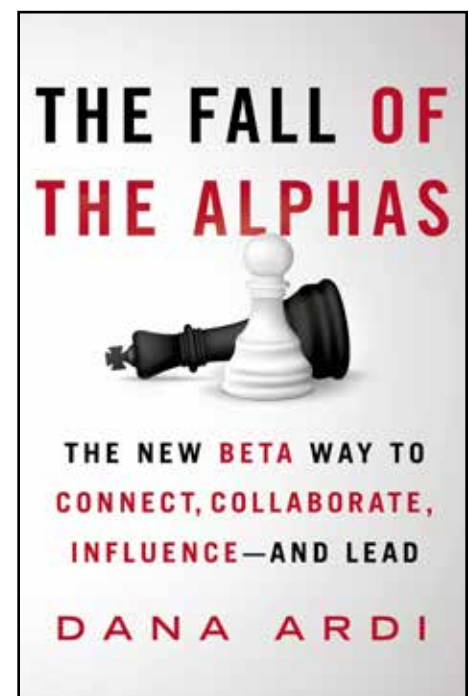
### **What does the future look like?**

For Millennials, technology enables a different work style. Crowdsourcing and other communal sharing of ideas all for working in a more collaborative way. The term "boss" is becoming antiquated, the next wave of leaders will be all about connecting, collaborating and influencing.

### **Who did you write the book for?**

I wrote the book to raise dialogue about how people need to organize to be productive. That could apply to any group - not just businesses, but the military, not-for-profits, families, etc. The idea of "command and control" is falling by the wayside. There's no such thing as one omnipotent leader. It takes a lot of different expertise. I think that's the idea wherever you are in life. The generations are demanding change. We must re-examine ourselves and look for opportunities to collaborate, connect and influence. These are good tools to add to your tool box no matter what you do.

*The Fall of the Alphas* by Dana Ardi came out October 1 and is available at Barnes and Noble and on Amazon.com. She welcomes you to contact her at [drdanaardi@gmail.com](mailto:drdanaardi@gmail.com) or (646) 331-1735 to continue the conversation.



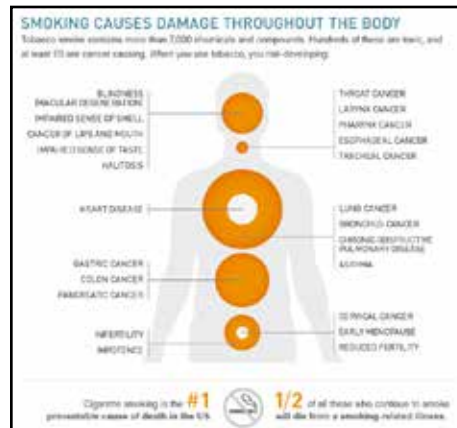
This section features helpful articles, tips and resources that promote our core value of Health and Wellness. Further resources can be found on the Health section of the L3.org



*Editor's Note: L3s August Health Resources focused on cancer prevention. We are featuring only one selected article in this newsletter - please visit [www.L3.org/Health](http://www.L3.org/Health) to find the rest of the series.*

You've probably heard conflicting reports about cancer prevention. Sometimes the specific cancer-prevention tip recommended in one study or news report is advised against in another.

In many cases, what is known about cancer prevention is still evolving. However, it's well accepted that your chances of developing cancer are affected by the lifestyle choices you make. So if you're concerned about cancer prevention, take comfort in the fact that some simple lifestyle changes can make a big difference. Consider these seven cancer prevention tips.



Using any type of tobacco puts you on a collision course with cancer. Smoking has been linked to various types of cancer - including cancer of the lung, bladder, cervix and kidney. And chewing tobacco has been linked to cancer of the oral cavity and pancreas. Even if you don't use tobacco, exposure to secondhand smoke might increase your risk of lung cancer.

Avoiding tobacco - or deciding to stop using it - is one of the most important health decisions you can make. It's also an important part of cancer prevention.

Although making healthy selections at the grocery store and at mealtime can't guarantee cancer prevention, it might help reduce your risk. Consider these guidelines:

- Eat plenty of fruits and vegetables. Base your diet on fruits, vegetables and other foods from plant sources - such as whole grains and beans.
- Limit fat. Eat lighter and leaner by choosing fewer high-fat foods, particularly those from animal sources. High-fat diets tend to be higher in calories and might increase the risk of overweight or obesity - which can, in turn, increase cancer risk.



- If you choose to drink alcohol, do so only in moderation. The risk of cancer increases with the amount of alcohol you drink and the length of time you've been drinking regularly.

Maintaining a healthy weight might lower the risk of various types of cancer, including cancer of the breast, prostate, lung, colon and kidney.

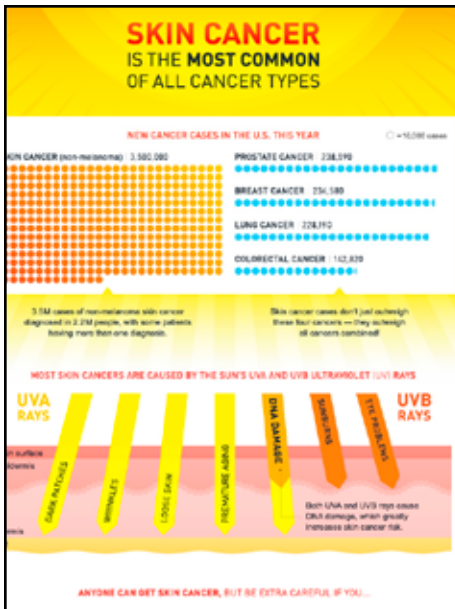
Physical activity counts, too. In addition to helping you control your weight, physical activity on its own might lower the risk of breast cancer and colon cancer.

Adults who participate in any amount of physical activity gain some health benefits. But for substantial health benefits, strive to get at least 150 minutes a week of moderate aerobic activity or 75 minutes a week of vigorous aerobic physical activity. You can also do a combination of moderate and vigorous activity. Include at least 30 minutes of physical activity in your daily routine.

Skin cancer is one of the most common kinds of cancer, and one of the most preventable. Try these tips:

- Avoid midday sun. Stay out of the sun between 10 a.m. and 4 p.m.,





when the sun's rays are strongest.

- Stay in the shade as much as possible. Sunglasses and a broad-rimmed hat help, too.
- Cover exposed areas. Wear tightly woven, loosefitting clothing that covers as much of your skin as possible. Opt for bright or dark colors, which reflect more ultraviolet radiation than pastels or bleached cotton.
- Don't skimp on sunscreen. Use generously and reapply often.
- Avoid tanning beds and sunlamps. These are just as damaging as natural sunlight.

#### 5. Get immunized.

Cancer prevention includes

protection from certain viral infections. Talk to your doctor about immunization against:

- Hepatitis B can increase the risk of developing liver cancer. The hepatitis B vaccine is recommended for certain high-risk adults - such as adults who are sexually active but not in a mutually monogamous relationship, people with sexually transmitted infections, intravenous drug users, men who have sex with men, and health care or public safety workers who might be exposed to infected blood or body fluids.
- Human papillomavirus (HPV) is a sexually transmitted virus that can lead to cervical and other genital cancers as well as squamous cell cancers of the head and neck. The HPV vaccine is available to both men and women age 26 or younger who didn't have the vaccine as adolescents.

#### 6. Avoid risky behaviors.

Another effective cancer prevention tactic is to avoid risky behaviors that can lead to infections that, in turn, might increase the risk of cancer. For example:

- Practice safe sex. Limit your number of sexual partners, and

use a condom when you have sex. The more sexual partners you have in your lifetime, the more likely you are to contract a sexually transmitted infection - such as HIV or HPV.

- Don't share needles. Sharing needles with an infected drug user can lead to HIV, as well as hepatitis B and hepatitis C.

#### 7. Get regular medical care.

Regular self-exams and screenings for various types of cancers can increase your chances of discovering cancer early, when treatment is most likely to be successful. Ask your doctor about the best cancer screening schedule for you.

Take cancer prevention into your own hands, starting today. The rewards will last a lifetime.

*Infographics: [www.cancer.org](http://www.cancer.org)*

*Additional articles online:*

- Breast Cancer Study Explores Therapy to Slow Recurrence (Vanderbilt)
- Understanding the process behind the BRCA genetic testing (Brigham & Women's Hospital)
- Living with Cancer, The Power of Friendship (Mayo Clinic)
- Could Daily Aspirin Help Prevent Cancer? (New York Presbyterian)
- Stop Cancer Before It Starts (Barnes Jewish Hospital)

## Did you know...

Every month, new resources are added to the Health & Wellness section of L3.org ([www.L3.org/content/health](http://www.L3.org/content/health)). This section always includes information about your L3 Health/GlobalAccess benefits and the Wellness Journal. In addition, news articles, tools, resources and recipes are routinely added. These resources were added in August:



- Supplements: Nutrition in a Pill?
- Herbal Supplements: What to Know Before you Buy
- 7 Myths About Calcium, Vitamin D and Healthy Bones
- A Permanent Treatment for Asthma
- Humanoid Robot Helps Train Children with Autism
- Rise and Shine: The 5 Best Breakfast Foods
- Recipe: Zucchini boats
- Recipe: Spinach Mushroom Fritatta

*Cont. from pg. 5 SEELY*

with developmental disabilities. Nina is a founder and board member of The Young Women's Alliance and a board member of the Austin Jazz Workshop. She was recently named Director at the Umlauf Sculpture Garden and Museum. Together, the Seelys support Austin Lyric Opera, The Long Center, Hospice Austin, Ballet Austin, and many others.

They have two children - daughter Kristin Fanning and her husband Casey live in Austin and son Alex Kahn is the genius chef at Trento. Like true Austinites, Frank and Nina enjoy listening to live music - they celebrated Frank's 60th birthday last year with backstage passes to a Rolling Stones concert.

*Cont. from pg. 5 COUGHLAN*

FGCU Renaissance Academy, The Friends of Art/Naples Museum of Art. She has also volunteered with the Peace Corps (Nigeria), Philharmonic Chorus, Junior League, League of Women Voters, League Club of Naples, Naples Botanical Garden, Naples Orchestra and Chorus.

In 1984, Pat and Joyce founded Kingsley Pines, a Co-Ed Children's Camp and Event Center. They owned and ran the camp until 2009 when they turned leadership over to their three sons. Pat and Joyce have established the Aspirations Program for camp scholarships for under-served children aspiring to reach beyond their economic and social borders.

Pat and Joyce have a "Brady Bunch" type family - between them they have six children (four have the same birthday!) and 12 grandchildren.

*Cont. from pg. 6 HERTWIG*

Jim and Debbie married in 2007 but have known each other for 20 years through the transportation industry.

Debbie has two daughters, Amelia and Kate. Amelia's husband, Michael, just graduated from Kellogg business school and joined DSB Cobalt as Debbie's potential successor. They live in Napa and are expecting their first child. Kate just finished her Master's in Information and Library Sciences and is currently working at Anchor Steam Brewing in San Francisco.

Jim has four children. David lives in Williamsport, PA and has three children. He owns and runs two restaurants as well as several buildings. Josh and his wife have one daughter and he owns and runs a bar and a restaurant in Williamsport. Cheri lives in Fort Worth and is a junior at TSU. James also lives in Fort Worth and is a sophomore in college.

*Cont. from FRONT*

offerings and participants. I was on a spirituality call the other evening and mentioned to those who joined in that it was such a treat to know them in a way that is seldom available to us with our general relationships.

I have had many conversations with members regarding what they want by way of upcoming program content. The message that comes through loud and clear is to keep providing opportunities for the members to be with each other. They encouraged me to expand the venues for having meaningful conversations on topics regarding the rest of their lives. Many told me how much they enjoyed our Prime Time phone groups and love the venue. They tell me this option fits their schedules and gives them a 90-minute break from their normal routines. Whatever the venue, L3 members say their personal relationships and conversations are the heart and soul of their membership.

I agree. Ten months into my role as Chairman, I am feeling quite privileged beyond that which I am entitled to. I had no idea how rich my life would be as a result of your asking me to serve in this capacity. What a blessing it has been. I have had the opportunity to get to know many of you in a way that would not have otherwise been possible. I feel selfish for having this opportunity. I am receiving so much more for my dues than I expected was possible.

Thank you all so very much.

Now, more than ever, I am convinced L3 provides an extra special venue of personal growth that needs to be experienced by more of our members than we reached in this year. To that end, I am charging the Board and Committees to lengthen their stride in moving L3 to the next content-driven level of performance.

I have been working with Tammy to develop a staff-enhancement option to accomplish the expansion of our content offerings and do so on a reasonable budget. I am committed that our 2014 content offerings be enhanced in a way that will facilitate greater member participation. (For your information, currently we have a larger ratio of member participation in our activities than most similar organizations).

With that in mind, I need your help. I am asking that you take a moment and complete an online survey. It is short and quick to complete. You will receive a notice of how to do it via email. Please take the time to give us this important feed back.

The Harvest Moon is shining on L3 and I'm in the field helping to not only harvest what we have but prepare for next year's crop. Join me in enjoying the opportunities in L3 that are coming up as a result of our previous plantings and help me in preparing for next year's harvest as well.



## COMINGS & GOINGS

Many thanks to these members who attended the purposeful travel trip in Santa Fe. We look forward to seeing the following people in Cuba. Thank you to these members for participating in Prime Time Connect and we hope to see more of you on future calls.

### PURPOSEFUL TRAVEL Santa Fe June 20-24, 2013

Laurada Byers  
Jeanne Klein  
Mickey Klein  
Ann Stuart Kling  
Bill Kling  
Jenny Lambert  
Michael Lambert  
Lynn Meredith  
Michael Sanyour  
Vicki Sebastiani  
Nina Seely

### PRIME TIME CONNECT Finance Discovery Group

Jack Bridwell  
Paul Comstock  
Patrick Coughlan  
Ron Feinstein  
Waddy Garrett  
Richard Kent  
Steve Knebel  
Mike Lambert  
Bob Luba  
Bill Midon  
Lil Montgomery  
Paul Robshaw  
Eddie Safady  
Vicki Sebastiani  
Russ Smith  
Janet Zand

Finance Discovery Group calls take place on the second Wednesday of each month at 10 a.m. CT

### PURPOSEFUL TRAVEL Havana, Cuba Oct. 30 - Nov. 3, 2013

Ichak Adizes  
Nurit Adizes  
Susan Benson  
Victor Benson  
Carmel Borders  
Tom Borders  
Jamie Browning  
Phyllis Browning  
Lori Fernandes  
Rick Fernandes  
Sandy Gottesman  
Lisa Harris  
Terrie Hard  
Ben Howerton  
Peggy Howerton  
Betsy Manchester

### PRIME TIME CONNECT Family Discovery Group

Paul Comstock  
Spencer Douglass  
Ron Feinstein  
Bonnie Milenthal  
Lil Montgomery  
Al Nagy  
Paul Robshaw

Family Discovery Group calls take place on the second Monday of each month at 7 p.m. CT

Maggie McElroy  
Tem McElroy  
Bonnie Milenthal  
David Milenthal  
Jeff Newton  
Sarah Newton  
Carson Rustand  
Warren Rustand  
Daniel Schwartz  
Vicki Sebastiani  
Gail Smith  
Russ Smith  
Karen Smith  
Sam Smith

### PRIME TIME CONNECT Fun & Play (wine) Discovery Group

Andra Brooks  
Susan Goodman  
Tony Laos  
Bob Luba  
Rob Lubeznik  
Bob McLennan  
Sue McMillin  
Bill Neyland  
Paul Mikos  
Jim Montgomery  
Paul Robshaw  
Russ Smith  
Paul Summers

### PRIME TIME CONNECT Health & Wellness Discovery Group

Charlene Madison Cassidy  
Paul Comstock  
Spencer Douglas  
Ron Feinstein  
Carole Hankin  
Debbie Johnson  
Missy Knebel  
Sherry Martin  
Perry Martin  
Lil Montgomery  
Marlo Rees  
Paul Robshaw

Health & Wellness Discovery Group calls take place on the fourth Wednesday of each month at 7 p.m. CT

### PRIME TIME CONNECT Spirituality Discovery Group

Charlene Madison Cassidy  
Paul Comstock  
Spencer Douglass  
Erv Kamm  
Jenny Kamm  
Bill Midon  
Frank Rees  
Verinder Syal  
Leia Syal

This discovery group has reached capacity and is closed to new members.

**Prime Time Note:** If you are interested in participating in Prime Time calls, please call 512-900-4435 or email [thale@L3.org](mailto:thale@L3.org). Please check the events calendar at [www.L3.org/eventsnews/html](http://www.L3.org/eventsnews/html) for the most up-to-date call schedules. New groups on new topics are forming all the time - don't miss out!



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Austin, Texas 78746 USA  
[www.L3.org](http://www.L3.org)

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## EVENTS CALENDAR

Sun <b>23</b> Feb	<b>Imagine Solutions</b> Naples, Florida <i>(ends Feb. 25)</i>
Wed <b>30</b> April	<b>2014 Spring Retreat</b> Boston, Massachusetts <i>(ends May 4)</i>
Fri <b>23</b> May	<b>Homes of Hope</b> Ensenada, Mexico <i>(ends May 26)</i>
Sun <b>31</b> May	<b>Roots of Rome</b> Rome, Italy <i>(ends June 6)</i>
Thurs <b>18</b> Sept	<b>Health Getaways</b> La Jolla, California <i>(ends Sept. 21)</i>

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