

**Southern Arizona Estate Planning Council
November 11, 2015**

**Sex, Death and Money!
Now That I Have Your Attention, Can We Talk???**
*How to engage our somewhat reluctant clients to have the most
meaningful conversations in their lives.*

By Leslie Dashew
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Estate planning obviously plunges advisors into conversations that most people would prefer not to have. This is a particularly sensitive subject for clients with family owned businesses whose mortality impacts not only their loved ones, but the very viability of a business, the well-being of employees, suppliers and customers.

Leslie Dashew will present a unique program in which she will weave together perspectives and tools that come from her work as part of the Aspen Family Business Group, her service on the faculty of Emory Medical School in Psychiatry and her own experiences and adventures. She will help us better understand the dynamics of families, death and difficult conversations and how to build the capacity to have these dialogues with our clients. Participants will have the opportunity to practice some of the skills and discuss challenges.

Outline:

- 1. The Need to Discuss Taboo Subjects as Professionals**
- 2. End of Life Dilemmas**
- 3. The Professional as a Role Model for Open Communication**
- 4. Dealing with Resistance to Communication about difficult subjects**
- 5. Three requirements for thorough Communication**
 - a. Safety**
 - b. Skills**
 - c. Structure**
- 6. Becoming The Trusted Advisor**

Background for Leslie Dashew

Leslie Dashew has combined her background in **organizational development** and **family therapy** to specialize in consultation to **family businesses** and families of wealth, as well as other organizations, private and public. She has been in practice for 40 years and is now located in Scottsdale, Arizona.

Leslie helps individuals, families and organizations chart the course of their future. Her work with family businesses includes prevention of serious problems by helping clients establish the policies, practices and skills of healthy family organizations. She also works with families who are in severe conflict to help them untangle the knots between family and business issues. Leslie's clients come from large and small businesses throughout the U.S. and abroad, in many different industries. Her expertise lies in helping these clients create harmony in the family and prosperity in the business.

Leslie also works with **families of wealth** to help identify a shared vision and strategies to help families optimize the impact of wealth on the family and its interests. While Leslie has worked extensively with **family-owned businesses**, she has not lost touch with her roots in consulting with leaders, boards and teams in other organizations as well.

Leslie's work includes:

- Providing **counsel to leaders**
- **Building Teams**
- Assessing the **family and business**
- **Developing a shared vision** for family and its assets
- **Creating practical plans** to achieve the vision
- **Developing clients' skills**, knowledge and shared perspectives
- Designing and **facilitating of family meetings** and family councils
- Creating and/or enhancing the **effectiveness of boards and foundations**
- **Resolving difficult conflicts**
- Providing on-going **support and advice to assure continued success**
- Facilitation and change **management services**

Leslie has written four books. She is a co-author of Working With Family Businesses, A Guide For Professionals, published by Jossey-Bass. Leslie's second book, The Best of The Human Side was published in October of 1997. Her third book, Health, Wealth and Families: How to Assure Your Wealth Helps, Not Hurts, Your Family was published in January of 2003. Leslie's newest book, *Keys to Family Business Success* (co-authored with her partners in the Aspen Family Business Group) was published in early 2011.

She is often quoted, and her writing on family business issues can be found in popular, business and trade magazines including *Family Business, INC, Black Enterprise, Entrepreneur, USA Today, Investment News* and many others. She was even featured in an interview in the Nepali publication, *The Organization*, and in *Professional Builder magazine*.

Leslie speaks widely at academic, professional and trade associations. She presents workshops and seminars for companies across the U.S. and abroad. She is renowned for her interactive programs on **family business issues, management, leadership, team building, change and stress management**, as well as individual and interpersonal **effectiveness**.

Leslie also conducts training for professional and trade associations such as *YPO (Young Presidents Organization)*, *Family Firm Institute*, *American Institute of CPAs*, *Society of the Plastics Industry*, *American Hotel and Motel Association*, *American Society for Training and Development*, *Attorneys for Family Held Enterprises (AFHE)* as well as Family Business Educational Forums, Universities, Chambers of Commerce and Small Business Development Centers.

As a **family therapist** as well as an **organizational development consultant**, Leslie's insights are also shared individually and in workshops on managing "problem" employees, chemical dependency, communication skills, stress and change management and overcoming barriers to professional effectiveness.

Leslie has served in many volunteer and professional organizations on boards and committees including the *Board of Trustees of Pitzer College*, *The McDowell Sonoran Conservancy*, the *Scottsdale Center for the Arts*, *Women Business Owners, Inc.*, the *Scottsdale Cultural Council*, the *Council For Children*, and the *Family Firm Institute*.

In 2010 The Family Firm Institute awarded Leslie the "Richard Beckhard Award" which is the most prestigious award in the family business field. It recognizes contributions to the knowledge and practice of advising family businesses. "Leslie has been a vanguard in our field and always at the leading edge of new knowledge and tools in understanding and serving family businesses," says Kelin Gersick, Ph.D, past award recipient and FFI leader. "She not only helps to develop many of the concepts and tools used by other professionals, but she also mentors individuals, families, and organizations across the globe to help chart the courses of their futures."

She was named One of The Ten Outstanding Young People of Atlanta and recently was elected to the *International Women's Forum*.

Leslie's undergraduate degree in psychology is from Pitzer College and her graduate degree in psychiatric social work is from the University of Michigan. She served on the Emory University Medical School Faculty in Psychiatry for 6 years.

Leslie is married to Jack Salisbury and has two children, Baleigh and Brett and one grandchild, Robin.