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**To:** BLA&LA Family Members  
**From:** Dr. Rebecca Trobe & Nicole Bettinger Zeidler  
**Subject:** March 9, 2026 Family Forum #1 Meeting Summary Notes

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The family is in an early, yet productive stage of formalizing governance, with strong engagement, thoughtful dialogue and clear momentum toward more structured decision making, broader participation across generations and improved communication systems.

#### Purpose of the Family Forum:

- A structured space for communication, decision making and education
- Agreement on a bi-monthly cadence for Year 1
- Clear intent to build toward clearer governance systems and processes

#### Meeting Guidelines:

- Group reviewed and aligned on core meeting norms, including:
  - Come prepared and follow the agenda
  - Be present and engaged
  - Practice respectful, constructive communication
  - Focus on issues, not individuals
  - Maintain confidentiality
- One refinement made to allow flexibility for meaningful contributions (time limit adjustment)
- Agreed to pilot these guidelines through the Labor Day Retreat and then revisit

#### Thoughtful Dialogue on Next Generation Involvement:

- Strong engagement around how and when to include younger family members
- General alignment on:
  - Moving away from strict age thresholds
  - Focusing on readiness, maturity and interest
  - Introducing concepts gradually and contextually
- Ideas discussed:
  - Earlier exposure to financial education
  - Topic-based participation (i.e. philanthropy vs. financials)
  - Shorter, more engaging formats for younger participants
  - Ongoing tension identified between a desire for early inclusion and education with the need to protect sensitive information and ensure readiness
    - Recognition this will require continued discussion, iteration through future forums and family conversations, as well as input gathered between meetings
- Acknowledgement that one size will not fit all families or individuals

#### Governance Structure Taking Shape:

- Introduction of key governance components and committees, including:
  - Philanthropy
  - Website/Editorial Committee
  - Executive Committee
  - Continued Values & Vision Committee
- Intent to distribute leadership and decision making beyond a centralized model
- Agreement to use surveys between meetings to gather input and maintain progress

#### New Family Website:

- The new website will launch early next month
- The Phase 1 Roll-Out will include a Shared Calendar, Family Tree & Property Info