

Speaker Profile
Bruce D. Werner
Serving Private & Family Businesses



Topics

Family Business

Owners Councils & Family Offices

Succession Planning

Corporate Governance

Strategy, Finance, M&A

Bruce Werner is the Managing Director of Kona Advisors LLC, which provides advisory services to owners and investors of private and family-owned companies. With exceptional experience in finance, strategy, M&A, governance, and succession planning, Kona Advisors creates practical solutions to the most challenging corporate problems.

Mr. Werner is an experienced Corporate Director, leading businesses through periods of positive transitions as well as crises. He writes and speaks on governance issues of concern to private and family businesses. He is the national Chair of the Director Development & Referral Program for the Private Directors Association.

Bruce has started four businesses and been a principal or consultant to several investment firms, with experience in running venture, private equity, hedge, and real estate funds, as well as futures & options firms. Two of his clients were recognized in the 2019 Inc. 5000 list of the fastest growing private companies in the country.

Mr. Werner spent 12 years at Werner Holding Co. in a variety of senior line and staff positions.

He held executive responsibilities in the Climbing Products, Aluminum Extrusion and Insurance businesses. During his tenure the company grew from \$180M to over \$500M in revenues.

Prior to Werner Holding Co., he co-founded a technology company that developed proprietary products for the engineering workstation market. Early in his career he worked as an engineer for a Kleiner Perkins venture company.

Mr. Werner earned a B.S. degree in Mechanical Engineering and Engineering and Public Policy with honors from Carnegie-Mellon University. Having earned an IBM Fellowship, he graduated from Stanford University with a M.S. degree in Manufacturing Systems Engineering. Mr. Werner completed his M.S. Management degree at the MIT Sloan School.

Speaking Topics

Private and Family Businesses

Family Business Issues

- Preparing the next generation to lead
- Roles & Responsibilities
- Mediation and Conflict Resolution
- Succession planning
- Exit planning
- Life after exit, second career planning

Owners Councils & Family Offices

- Family Council
- Family Constitution
- Ownership directives to Company Board and Management
- Assessing and fulfilling family needs via family office
- Managing family offices over the long term

Corporate Governance

- Establishing Advisory & Fiduciary Boards
- Recruiting, training, and retaining directors
- Audit, Compensation, Nominating and Special Committees
- Managing the Board and its Committees: best practices
- Fiduciary duty: Oversight, Transparency and Accountability
- Risk Management
- Crisis Management
- Board Performance and Compensation
- Director/Management interface

Finance and M&A

- Business strategy, capital structure, budgeting
- Buy-side and Sell-Side strategies and tactics
- Coaching decision-makers through the M&A process
- Building and managing deal teams



Speaking Engagements

Event	Date & Location
Private Client Understanding the Private Equity Industry Speaker – Zoom Event	July 2020 Virtual
Vistage International Working “ON” your business: M&A, Governance and Exit Planning Speaker – Zoom Event	June 2020 Virtual
GWS Auctions Community Succession Planning & Governance Speaker – Zoom Event	May 2020 Virtual
Next Generation Leadership Program Innovation & Growth – Loyola University Family Business Center Speaker	April 2020 Chicago, IL
Zell Fellows – Private Transactions Workshop Kellogg Center for Family Enterprises – Northwestern University Speaker	March 2020 Evanston, IL
Bank of America Family Business Conference Family Matters Panelist	February 2020 Dallas, TX
Bank of America Family Business Conference Family Matters Panelist	January 2020 Charleston, SC
Inland Press Association Family Business Conference Success with Succession Planning Panelist	October 2019 Chicago, IL
Chicago Family Business Roundtable Good Governance and the Multi-Generational Family Office Panelist	June 2019 Chicago, IL

Private Directors Symposium M&A Considerations for the Private Company Director Panelist	May 2019 New York, NY
Private Directors Association The Board and Tax Experts: A Dialogue on the New Tax Laws and Private Companies Panelist	May 2018 Chicago, IL
Midwest Business Brokers Institute Family Business Transactions: Breaking the ties that bind Keynote Speaker	January 2018 Oak Brook, IL
Cornell University SC Johnson School of Business Families in Business Conference: Private Equity & Family Businesses Panelist	October 2017 Ithaca, NY
Force Five CEO Forum Forming and Managing Boards of Directors for Private Companies Keynote Speaker	September 2017 Nashville, TN
Cavendish Global Forum Doing Good by Doing Well: Governing to Get Results Moderator	July 2017 Chicago, IL
National Association of Home Builders Succession Planning and Exit Strategies Keynote Speaker	October 2016 Grand Rapids, MI
Illinois Institute for Continuing Legal Education Family Businesses in Transition: The Werner Ladder Story Keynote Speaker	May 2013 Chicago, IL
Families, Enterprises and Wealth Conference II Energy Systems and Opportunities Speaker	June 2012 Chicago, IL
Peakstone Advisors – Private Event Maximizing the Value of your Company Speaker	August 2011 Chicago, IL
Families, Enterprises & Wealth Conference I Search Marketing Speaker	November 2010 Chicago, IL
Turnaround Management Association Family Business and Private Equity Panelist	June 2009 Chicago, IL
Presidents Forum Family Businesses in Transition: The Werner Ladder Story Keynote Speaker	July 2007 Cary, IL

Quotations

Article	Date
“The Tricky Task of Handing the Family Business to the Next Generation.” The Wall Street Journal, Journal Reports: Retirement https://www.wsj.com/articles/the-tricky-task-of-handing-a-family-business-to-the-next-generation-11587161391	April 2020

Webinars

Webinar	Date
“Director Responsibilities to Assure Data Systems Resiliency in a WFH World” Private Director Association – Broadcast Panelist	May 2020
“PDA Director Training and Referral Program: How Will it Help Me?” Private Director Association – Broadcast Panelist	May 2020
"Executing your Fiduciary Duty during a time of Crisis – What Directors Need to Know." Private Director Association – Broadcast Panelist	April 2020

Podcasts

Podcast	Date
Successful Generations LLC Episode 68: Family Business Governance Done Right with Bruce Werner https://successfulgenerations.com/episode068/	July 2019

Publications

Cited Publication
<p>Werner, Bruce. “The Art Of Designing A Board That Can Pull Your Business Through Crisis.” <i>Forbes.com.</i> July 2020. <https://www.forbes.com/sites/forbesbusinesscouncil/2020/07/14/the-art-of-designing-a-board-that-can-pull-your-business-through-crisis/#574768017305></p>
<p>Werner, Bruce. “Use Good Governance To Steer A Rudderless Ship.” <i>Forbes.com.</i> June 2020. <https://www.forbes.com/sites/forbesbusinesscouncil/2020/06/16/use-good-governance-to-steer-a-rudderless-ship/#524a0f501ffd></p>
<p>Werner, Bruce. “Board Evaluations: What can you expect from private and public companies?” <i>Intouch Networks Blog.</i> June 2020. <https://us.intouchnetworks.com/blog/someone-once-told-me-that-feedback-is-the-breakfast></p>
<p>Werner, Bruce. “Why Succession Planning Is Vital And How You Can Start Today.” <i>Forbes.com.</i> May 2020 <https://www.forbes.com/sites/forbesbusinesscouncil/2020/05/26/whysuccession-planning-is-vital-and-how-you-can-start-today/#7253e5134069></p>
<p>Werner, Bruce. “Duty of Care and Taxes When Selling a Business.” <i>PrivateDirectors.Association.Org.</i> February 2020. <http://www.privatedirectorsassociation.org></p>
<p>Werner, Bruce. “A Practical Approach to Revising Corporate Governance. ” <i>The Practical Lawyer,</i> February 2020: pg. 20-22.</p>
<p>Werner, Bruce. “Options to Revive a Failed Succession Plan.” <i>Estate Planning,</i> February 2020: pg. 29-30.</p>
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<p>Werner, Bruce and Cain, Barry. “The PDA Director Development and Referral Program: A View from the Participant and Coach Perspectives.” <i>PrivateDirectors.Association.org.</i> September 2018. <http://www.privatedirectorsassociation.org></p>
<p>Werner, Bruce. “Soliciting Initial Outside Directors for Private Companies.” <i>PrivateDirectors.Association.Org.</i> September 2017. <http://www.privatedirectorsassociation.org></p>

Werner, Bruce. "Game Plan for Using Outside Directors in Family Business." <i>Estate Planning</i> , August 2017: pg. 29-33.
Werner, Bruce. "Cyber Security Challenges for Family Business Boards of Directors." <i>FamilyCapital.com</i> . May 30, 2017. < https://www.famcap.com/2017/05/2017-5-30-viewpoint-cybersecurity-challenges-for-family-business-boards-of-directors/ >
Werner, Bruce. "New Director Considerations During the Recruitment Process." <i>PrivateDirectorAssociation.org</i> . November 2016. < http://www.privatedirectorsassociation.org >
Werner, Bruce. "Soliciting Initial Outside Directors for Private Companies." <i>Private Company Director</i> , August 2016: pg. 36-38.
Werner, Bruce and Wolven, Lauren. "Insights and Lessons for Surviving the Sale of a Family Business." <i>Estate Planning</i> , January 2011: pg. 22-28.

Columns

Cited Publication
Werner, Bruce. "Cybersecurity Challenges for Boards of Directors." <i>Financialpoise.com</i> . June 2020. < https://www.financialpoise.com/cybersecurity-boards-of-directors/ >
Werner, Bruce. "Non-Executive Directors Provide Leadership When It is Needed Most." <i>Financialpoise.com</i> . June 2020. < https://www.financialpoise.com/non-executive-directors-advantages/ >
Werner, Bruce. "Warren Buffet Speaks Out on Independent Director Performance." <i>Financialpoise.com</i> . May 2020. < https://www.financialpoise.com/warren-buffett-annual-letter/ >
Werner, Bruce. "That's SOC, Not SOX: SOC Reports Audit the Safety of Company Data." <i>Financialpoise.com</i> . March 2020. < https://www.financialpoise.com/soc-report/ >
Werner, Bruce. "Recognizing Special Situations in Private Companies." <i>Financialpoise.com</i> . March 2020. < https://www.financialpoise.com/special-situations/ >
Werner, Bruce. "Sleep Better with Reps & Warranties Insurance." <i>Financialpoise.com</i> . February 2020. < https://www.financialpoise.com/reps-and-warranties-insurance/ >
Werner, Bruce. "A Tale of Competitive Bidding and Pre-emptive Bids." <i>Financialpoise.com</i> . January 2020. < https://www.financialpoise.com/competitive-bidding/ >
Werner, Bruce. "Can Seeking Help from the Lender Fix Distressed Companies' Woes?" <i>Financialpoise.com</i> . October 2019. < https://www.financialpoise.com/distressedcompanies/ >

<p>Werner, Bruce. “Without Good Governance Family Businesses Go Nuclear.” <i>Financialpoise.com.</i> September 2019. < https://www.financialpoise.com/without-goodgovernance-family-businesses-go-nuclear/></p>
<p>Werner, Bruce. “Lessons on Family Governance in Business.” <i>Financialpoise.com.</i> September 2019. < https://www.financialpoise.com/lessons-on-family-governance/></p>
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<p>Werner, Bruce. “ An Alternative Exit Strategy for Distressed Business Owners.” <i>Financialpoise.com.</i> June 2019. < https://www.financialpoise.com/an-alternative-exit-strategyfor-distressed-business-owners/></p>
<p>Werner, Bruce. “Acquisitions: That Company May be Good to Own, but tough to Buy.” <i>Financialpoise.com.</i> May 2019. <https://www.financialpoise.com/acquisitions-that-companymay-be-good-to-own-but-tough-to-buy/></p>
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<p>Werner, Bruce. “An Experienced Executive May Make an Effective Board Member.” <i>Financialpoise.com.</i> January 2019. < www.financialpoise.com/an-effective-board-member/></p>
<p>Werner, Bruce. “Family Governance is Not Business Governance.” <i>Financialpoise.com.</i> December 2018. < www.financialpoise.com/family-governance-is-not-businessgovernance/></p>
<p>Werner, Bruce. “Banker, Broker or Sell it Yourself: Choosing the Right Method When Selling Your Business.” <i>Financialpoise.com.</i> November 2018. < www.financialpoise.com/selling-a-business/></p>
<p>Werner, Bruce. “Guidelines to Improving Banking Relationships.” <i>Financialpoise.com.</i> August 2018. < www.financialpoise.com/guidelines-to-improve-banking-relationships/></p>
<p>Werner, Bruce. “Always Balance Family and Business in a Family owned Business.” <i>Financialpoise.com.</i> July 2018. < www.financialpoise.com/family-owned-business/></p>
<p>Werner, Bruce. “Building the Best Strategy to Drive Cash Allocation.” <i>Financialpoise.com.</i> May 2018. < www.financialpoise.com/tag/private-company-boards/></p>
<p>Werner, Bruce. “Can Seeking Help from the Lender Fix Money Troubles?” <i>Financialpoise.com.</i> April 2018. < www.financialpoise.com/seeking-help-from-the-lender/></p>

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