



**Entrepreneur and Family Business Council at DePaul University
Confidential Membership Profile Form**

This is a confidential profile and is used to allow us to contact you easily, to provide this information (in confidence) to any Forum you wish to join, and to allow us to provide the demographics of our membership. Please complete all questions or write N/A if not applicable.

BUSINESS INFORMATION

Member Name:

Company:

Mailing Address:

Street, City, State, Zip

Physical Address:

Street, City, State, Zip

Same as mailing address

Company Phone:

Ext:

Cell:

Website:

Email:

Title:

No. of Employees:

Sales/Revenue:

Year Founded:

Industry:

Product/Business Description:

Business Type:

Family

Entrepreneurial

Privately-Held

Generation currently in leadership role:

First

Second

Third

Fourth

Fifth

Family Members working in business:

(Name & relationship)

Partners in Business:

Succession Planning:

Where in the process are you?

Please send completed forms via e-mail to Liz@chicagofbc.com or via fax to 312.362.8462

PERSONAL INFORMATION

Spouse/Significant Other Name:

Active in Business?

Yes

No

Home Address:

Street, City, State, Zip

Birthday (mo/dy/yr):

Children (Name & birth year):

Hobbies, Interests, & Community Involvement:

Please list any organizations/associations that you are a part of outside of CFBC:

CFBC PROUD MEMBER LISTING

We would love the opportunity to promote you as a proud EFBC member on our website. Please select below if you would like your logo to be featured on the EFBC's PUBLIC proud member page.

Yes, please add me to the proud member list

No, please do NOT add me to the proud member list

Ethnic origin: Please specify your ethnicity.

White

Hispanic/Latino

African American

Asian

SHARED EXPERIENCE DATABASE:

We're collecting a confidential log of experiences within our membership. When a member is going through an issue, it's our goal to connect them with someone in the community who has experienced a similar situation. Please select anything you've experienced that you are willing to share with another member of CFBC.

Advisory Boards
Alzheimer's / Dementia
Bank Jail / Workout
Bankruptcy
Buyout Family
Buyout Partner
Cancer
Counseling
Death / CEO
Death / Child
Death / Spouse
Embezzlement / Theft
EOS – Entrepreneur Operating System
Factoring (Alternative Financing)
Family Lawsuits
Family Meetings
Family Retreats
Firing Family
GGOB – Great Game of Business (Open Book Management)
Heart Issues
Mergers / Acquisitions
Mezzanine Financing
Military
PEO – Professional Employer Organization
Selling Business / Family
Selling Business / Private Equity
Selling Business / Competitor
Selling Business / Employees (ESOP)
Succession / Gifting Stock

Please send completed forms via e-mail to Liz@chicagofbc.com or via fax to 312.362.8462

EMPLOYEES AND FAMILY MEMBERS

EFBC programs (Roundtables, Breakfast Clubs, Community in Forum, workshops, events) are **open to your family members and employees free of charge**. We offer resources in areas of Finance, HR, Sales, Marketing and more. If you would like any family members or employees to receive invites, please provide their information below.

Name:

Company:

Title:

Email:

Relation: **Employee** **Family** **Other:**

Name:

Company:

Title:

Email:

Relation: **Employee** **Family** **Other:**

STRATEGIC PARTNER RESOURCES

We have eight strategic partners which underwrite our mission. They're experts in their field and are a phone call away for you to ask any question. These strategic partners host educational events outside of EFBC's educational programs and they always welcome EFBC members to attend. You have the option to receive their monthly newsletters, white papers and invitations to their educational programs. Please select below if you would like to receive the strategic partner resources and you will be added to their mailing lists.

CFBC's eight Strategic Partners are:

Burke, Warren, MacKay & Serritella, P.C. - *Lawyer*

Cray, Kaiser Ltd. - *Accountant*

GCG Financial - *Health and Business Insurance*

MB Financial Bank - *Banker*

ODEA - *Marketing*

Porcaro, Stolarek, Mete - *IT Services*

Psyched - *Human Capital*

Shallcross Financial Planning - *Financial Planner*

Yes, I would like to take full advantage of our Strategic Partner resources:

No, at this time I'll pass on receiving these resources.