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MONDAY, SEPTEMBER 11, 2023 | 4:30PM | HARD ROCK CASINO CINCINNATI



Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

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PUBLISHER’S NOTE

This publication is an advertising supplement to the Business Courier in cooperation with the Goering Center, an affiliate of the University of Cincinnati’s Carl H. Lindner College of Business.

Established in 1989, the Goering Center is the country’s largest university-based educational resource for family and private business.

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What Sets You Apart Helps You Succeed



Carol Butler,
Goering Center President

Did you know that the humble stirrup likely changed the course of history? While most horseback riders today probably take their stirrups for granted, the stirrup's emergence completely transformed horseback riding and mounted warfare by giving riders the stability they lacked previously. Cavalry soldiers equipped with stirrups could move faster and strike harder, and they did, with the stirrup helping Genghis Khan forge the largest empire the world had yet seen. As the innovation travelled West, some historians believe the stirrup aided the rise of the knightly class and the establishment of feudalism, which the French Revolution abolished.

That's an example of a successful difference! For the Goering Center 2023 Family and Private Business Awards, we asked businesses to tell us their successful difference. What is setting them apart and driving their success?

A few themes emerged, and not surprisingly, giving the recent focus on the Great Resignation, delivering a strong employee experience is proving a differentiator for some, including:

- One that measures its success by how well the company lives up to its core value of being an extraordinary place to work and have a career and providing a proper life/work balance, in that order
- Another that promises to be the best first job for its young new hires, backing up the promise with coaching, training in communication skills and business etiquette and mentoring to grow its pool of future leaders

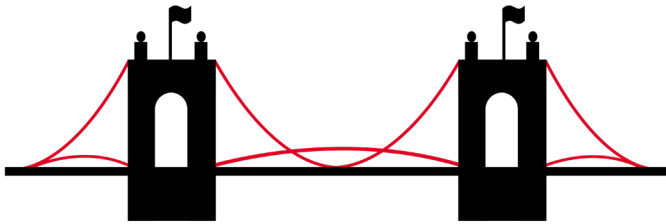
Partnering with clients to achieve success has also been winning strategy for our honorees, including:

- One that invests time and effort to truly understand the objective of a project from all angles, engaging with the client frequently and using active listening to ensure the client has an active role in bringing their vision to life
- Another that fulfills its mission of being remarkable to clients by involving them closely in finding a solution for their pain points, listening to the client's ideas and expectations as part of the planning process

There are many more examples you'll read in the profiles that follow, and I'm honored that the Goering Center has had a role in educating and nurturing family and private businesses in our community, helping companies make contributions that drive our community's bright economy.

I invite you to join me and my co-emcee, legendary Bengal's quarterback Kenny Anderson, to come celebrate them all, as well as our Hall of Fame inductee Verst Logistics and Volunteer of the Year Brad Haas of Katz Teller, at the 24th Annual Private and Family Business Awards, taking place Monday, September 11 at the Hard Rock Casino Downtown. We've got a tailgate party planned for you this year with lots of fun and surprises, and I promise you'll be home in time for Monday Night Football. Check out our website for details and tickets.

If you're interested in learning how the Goering Center can help your private or family business find your successful difference, I encourage you to sign up for an overview of our Next Generation Institute on September 20 ahead of the new session starting in late November or contact us to talk about your business needs. We look forward to seeing you.



Family & Private Business Awards
GOERING CENTER | 2023

Congratulations to our 2023 Family & Private Business Honorees

Doran Manufacturing
Jim Samocki
President

Mike Albert
Marty Betagole
CEO

Kid's First Sports Center
Jen Evans
President

Modern Ice Equipment & Supply
Gary Jerow
CEO

KZF Design
Doug Marsh
President & CEO

Monarch Financial Advisors
Susan L. Burnett
CEO/Owner

MACKEY Advisors
Mackey McNeill
Founder and CEO

Paul Hemmer Company
Paul W. Hemmer Jr.
CEO

Metalworking Group
Doug Watts
CEO
Brian Dubay
President

Solid Blend Technologies
Ken Elrich
Vice President & Founder

2023 HALL OF FAME
VERST GROUP LOGISTICS

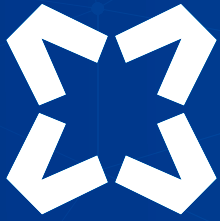
KEITH BALDWIN
VOLUNTEER OF THE YEAR

2023 RISING LEADER
FINALISTS

BRAD HAAS
Katz Teller

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25th Annual Family & Private Business Awards!



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Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

A Letter From the Judges

Judging for the Goering Center Family and Private Business award is always a challenging and enlightening experience. This year's theme of "success" leads us to ponder the question of whether our judging has been successful. A review of the ten winners and twenty honorable mentions allow us to conclude that it has.

As happens with each year's theme, there were many definitions of success as presented through the unique lens of the family and private businesses that chose to submit their applications. We read stories of success related to revenue growth, community involvement, product and service line expansions, process improvements, and teamwork, leading to difficult decisions on our part.

The top businesses are those that can measure their success across a wide spectrum of metrics, both

financial and non-financial. Those companies realize, that while the bottom line is important, it takes many varied contributions to get there. As we look through the final list, we believe that we have highlighted the best "successful companies."

We extend many thanks from the Judges to the Goering Center for a challenging and rewarding experience. While we could only pick ten companies to receive our award, we are reminded once again how many true winners there are in our family and private business community. Best wishes for many years of continued success.

Mike Miller
Rex Wetherill
Barbara Fant
Chris Ramos

Thank You to Our 2023 Family & Private Business Awards Judges



Michael Miller
LCNB Wealth



Barbara Fant
Clinical Research Consultants, Inc.



Christopher Ramos
PNC Bank



Rex Wetherill
IoT Diagnostics



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Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

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Congratulations to the 2023 honorees!





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Volunteer of the Year: Brad Haas of Katz Teller

Brad Haas, Partner and Attorney for Katz Teller, is the 2023 recipient of the Center's Keith Baldwin Award, which honors an outstanding volunteer. He has been involved with the Goering Center for more than fifteen years.

As someone who has years of experience helping family businesses transition from one generation to the next, Brad understands what an asset the Goering Center for Family and Private Business is for the Greater Cincinnati business community. Serving as one of the most influential volunteers in our Next Generation Institute (NGI), he shares his time, knowledge and experience navigating families and businesses through the complexities that come with transitioning a company.

"The Goering Center has enriched so many lives in family and private business through the services they provide," Brad says. "They go far beyond succession planning, offering leadership development, strategic planning, areas that private companies need to succeed but may be lacking access to these resources."

Brad initially became involved with the Center in 2008 when the Next Generation Institute was in its infancy. He, along with other business advisors, worked to construct part of the eight steps of transitioning a business. Brad created three of the eight sessions: contingency planning, legal and tax planning, and forming a transition team. This valuable knowledge sharing with family member participants helps them prepare for a successful transition.

Brad represents family businesses in his practice and is confident that NGI is fulfilling a necessary need. "I've probably seen over 300 companies



Brad Haas, Partner at Katz Teller, is the 2023 recipient of the Keith Baldwin Award, acknowledged for exemplary commitment and voluntary service to the Goering Center.

pass through NGI in my 15 plus years and no two families are the same. Everybody has different circumstances, but we can help them through some of the similar challenges to put them on a good path.

With over 25 years of experience in handling general corporate matters, Brad has helped many clients with transition of ownership from one generation to the next, guiding them with the basic principles he shares in the Next Generation Institute. He has spent his entire career with Katz Teller, a law firm specializing in civil litigation, corporate law, mergers and acquisitions, commercial real estate, tax, employee benefits, bankruptcy, and

estate planning.

"With Brad's level of expertise and long-term commitment to the Goering Center and our members – he was an easy choice for this prestigious award. Brad cares deeply about driving to a successful outcome for the family business and the family. We are fortunate to have Brad as a resource for the Center as well as a presenter for the Next Generation Institute," shared Carol Butler, President of the Goering Center.

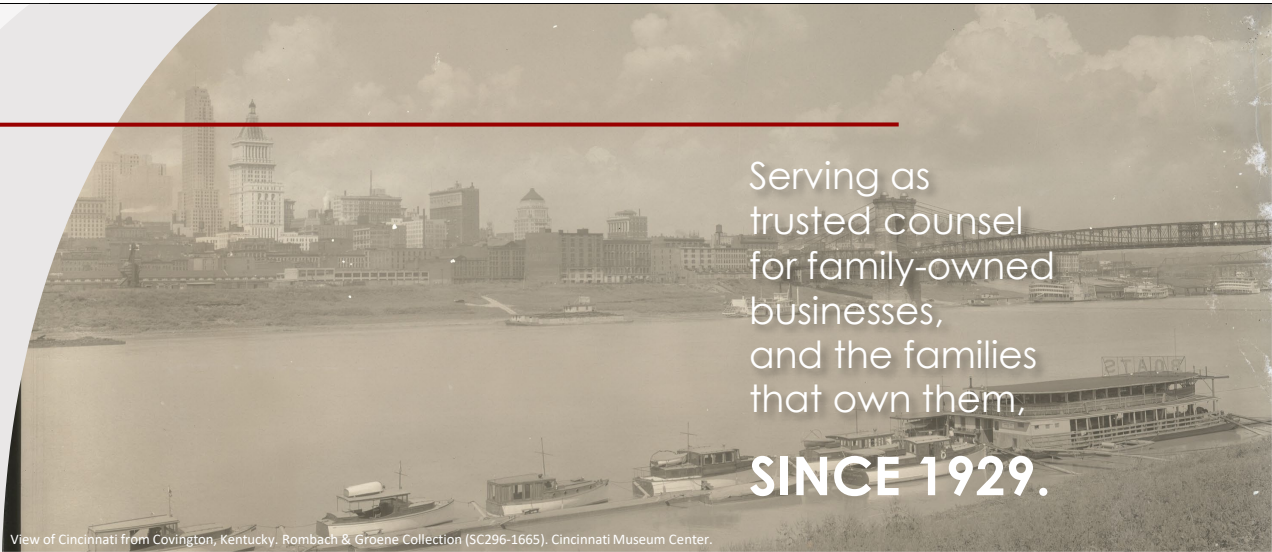
"Whenever I thank Brad for his contribution to achieving the mission of the Goering Center – to nurture and educate family & private business-

FOUNDING PRINCIPLES

- We are proud and honored that the Goering Center is supported by over 200 professionals who volunteer their unique expertise, leadership and perspective to the business community through our educational programs, our boards and our committees.
- To recognize their outstanding effort, each year we present one of our volunteers with the Keith Baldwin Volunteer Award. This award was created to honor the extraordinary commitment of one of our earliest and most dedicated volunteers, Keith Baldwin.

es – his response is always the same, 'No – thank you for the opportunity to engage with the businesses and their teams.' Clearly, the gratitude runs in both directions, representing a true volunteer," adds Butler.

Our founder, John Goering, believed in the power of connecting others and providing members with enriching experiences while giving them access to leading experts. Brad helps to fulfill Mr. Goering's vision, and for that, we are grateful.



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and the families
that own them,

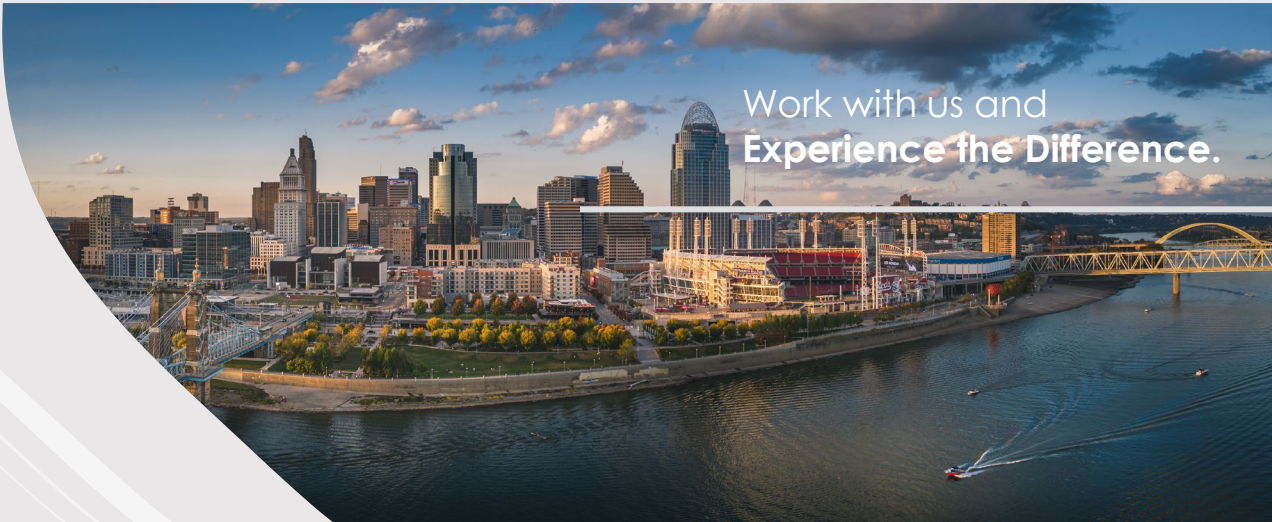
SINCE 1929.

View of Cincinnati from Covington, Kentucky. Rombach & Groene Collection (SC296-1665). Cincinnati Museum Center.



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Congratulations to
the 2023 Goering
Center Honorees



Work with us and
Experience the Difference.

Doran Manufacturing: Be Extraordinary to be Successful

Doran Manufacturing, a leading global provider of safety and maintenance monitoring technology for commercial vehicles, celebrates its 70th anniversary this year, and over the course of its decades in business, its leaders have learned the value of being extraordinary. In fact, this organization measures its success by how well it lives up to its core value of making Doran an extraordinary place to work and have a career.

Doran makes a daily commitment to uphold its culture statement of “providing a proper life/work balance (in that order)” and in the process, the company has created an environment with an unusually high level of trust within its team, customers, partners and suppliers. In an era with low unemployment and a transient workforce, the average career tenure has grown beyond a decade to 10.8 years for the 20+ members of the Doran team. That depth of company experience has propelled Doran to produce solid financial results with consistent year-over-year revenue and profit growth.

This dedicated team recently completed a seamless internal transfer of leadership and ownership, while simultaneously deploying a new ERP/CRM tool, moving to a new facility in Blue Ash and establishing new company records for orders and shipments.

Beginning in 2020, the Goering Center helped newly promoted President Jim Samocki meet with and learn from a group of leaders through his executive roundtable group participation and information sessions and events. In addition, the company utilized the Member Alignment Profile assessment to deliver insights and an understanding of where it



Jim Samocki (President) of Doran

was performing well and to identify opportunities for improvement in the 10 best practices of family and privately held businesses.

Soon thereafter, the leadership team got to work on updating the company’s mission, vision, and culture statements with carefully chosen words to establish “who and what” they wanted the company to be in the future. The important next step of the process was taken to create a new strategic plan along with a succession/contingency plan to identify “how” it was going to get there.

Additionally, leadership also addressed an opportunity for improvement in “giving back” and

today, the company holds regular contests that allow the winners to choose local organizations as beneficiaries of charitable contributions made on their behalf. Doran also gives back to its own team by consistently investing in both professional and personal development to help the people on the team become the best version of themselves and enable the company to become the best version of itself.

Doran’s focus on being extraordinary and empowering its people to problem solve has paid dividends in building a tenured team with a growth mindset that is focused on the two core principles of people and trust which creates and reinforces Doran’s competitive advantage on a daily basis.

Doran Manufacturing

President: Jim Samocki

Address: 4362 Glendale Milford Road, Cincinnati OH 45242

Phone: 886-816-7233

Website: Doranmfg.com

About: Founded in 1953, Doran Manufacturing, LLC is a privately-held, management-owned company based in Blue Ash, Ohio with a focus on making Doran an extraordinary place to work and have a career with a focus on people and trust. Our team members possess a shared drive for success with a spirit of continuous improvement as we focus on creating and supplying innovative and trusted safety and maintenance monitoring technology, products and service for commercial vehicles. We proudly serve customers from 46 countries around the world in the truck fleet, off-the-road equipment, school bus and agricultural vehicle markets. We work to exceed our customers’ expectations through a world-class level of service and by treating their problems as if they are our own through the creation of customized and innovative solutions.



People are at the heart of what we do.

At its heart, a business is about people. A group of people coming together to create something bigger than themselves. To create a solution or a product or an experience in the service of other people. At Huntington, it’s our belief that running a business is about more than making money, it’s about making people’s lives better. So let’s roll up our sleeves and get to work, together.

Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

Kids First Sports Center: Where Culture is King

Offering a broad range of sports and related activities for children, Kids First Sport Center’s mission is to give kids the tools to grow into happy, healthy, responsible adults. The company has 4,500 children currently enrolled and has served 50,000 since its founding in 1973 by Jeff Metzger, current senior advisor and one of three owners.

Today, Kids First is a 183,000 square foot wonderland of kids’ activities sitting on 15.5 acres in Sycamore Township. With over two dozen programs, Kids First is the country’s largest family-owned children’s instructional services operation. Its focus on culture – detailed in the company’s 26 Points, which cover the mission, unifying and teaching principles and hiring mantras – has spurred the company’s growth, because at Kids First, culture trumps everything in a bid to ensure Kids First and its team do good things for kids.

Kids First is proud to be one of the Cincinnati Enquirer’s Best Places to Work and it credits transparency and inclusion as two of the reasons for that designation. As an open book company, Kids First shares all financial data (except individuals’ wages) with its leaders who in turn share it with their team members. The open book leadership strategy is grounded in the belief that reasonable people, given the same information, will come to the same conclusion. Company leaders mentor team members in analyzing the data and making sound business decisions, helping transform sports coaches into businesspeople.

Kids First is focused on creating the next generation of leaders through careful hiring practices, extensive training and doing everything required to make Kids First a great place to work. For many



Jen Evans (President) of Kids First Sports Center

employees, Kids First may be their first place of employment, and Kids First aims to be the best first job. Young candidates and employees receive coaching through the interviewing process and learn communication skills, business etiquette and how to be a great team member from mentors, helping the company grow its own future leaders.

Empowering employees with critical skills has not only led to successful programming at Kids First, but has also led to the launch of a success-

ful expansion of The Campus, the early learning center located inside Kids First. The Campus at Kids First was co-founded by Jeff, and daughter Joanie Metzger Weghorst, in 2013, and serves infants through Pre K from the surrounding communities.

Kids First puts in the work to hire, inspire, train, teach and more, always striving to do it better. And that may be its biggest competitive advantage of all.

Kids First Sports Center

President: Jen Evans
Address: 7900 Kemper Road, Cincinnati, OH 45249
Phone: 513.489.7575
Website: kidsfirstsports.com
About: Offering sports and related activities for children, Kids First views sports as tools to achieve more important goals, in particular, to give kids the tools to grow into happy, healthy, responsible adults (Our Mission). Kids First was founded in 1973 by Jeff Metzger after dropping out of UC Engineering to pursue his passion coaching gymnastics. After 11 facility iterations, Kids First has grown into a 183,000sf wonderland of kids’ activities that sits on 15.5 prime acres in Sycamore Township. With over two dozen programs, Kids First is the largest family-owned Children’s Instructional Services operation in the USA and, probably, the world.



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Designing Better Futures with KZF Design

KZF Design’s sincere and ambitious mission is “Designing Better Futures” on behalf of clients, staff, partners and community and over 67 years in business as an architectural/engineering firm, it’s developed a comprehensive approach for defining success:

- Happy, repeat clients
- Thriving, dedicated staff
- Projects that demonstrate thoughtful design and technical expertise
- Maintaining a balance between growth and quality

Every initial collaboration that leads to a lasting partnership is a testament to KZF’s capabilities, a confirmation that it has fulfilled its promise and a strong indicator of its overall success, which is fueled directly by a team of talented professionals.

KZF’s understanding that every client is unique helps build those partnerships. KZF invests time and effort to truly understand a project’s objectives from every angle. Through frequent engagement and active listening, it ensures that clients play an active role in bringing their vision to life. Establishing strong partnerships enables KZF to design spaces which best reflect the client’s identity, culture and values.

Knowing that its prosperity is intertwined with its employees’ satisfaction and engagement, KZF strives to create a supportive and inspiring work environment where employees can flourish personally and professionally. The effort has not gone unnoticed, with KZF earning Top Workplace honors from the Cincinnati Enquirer for two years running.



Doug Marsh (President & CEO) of KZF Design

Creativity is at the core of what KZF does, and its team also defines success in the innovative thinking that transforms a project from concept to a prominent and lasting community landmark. By challenging itself to think inventively, keep pace and even get ahead of the curve in a rapidly evolving industry, KZF maintains a competitive edge and provides groundbreaking results for clients that support its long-term viability.

Fiscal stability is crucial to success and longevity and KZF manages its financial resources effectively to make informed, strategic and sound business decisions, while managing its growth mindfully.

The company prioritizes sustainable expansion, enabling it to uphold the standards it sets for itself while delivering exceptional service to clients and a nurturing workplace to its staff that includes active involvement in professional organizations to expand knowledge and strengthen networks and commitments to many local non-profit organizations.

KZF can see the results of its efforts in the built environment and the firm and its employees take pride in their contributions to the shape of Cincinnati’s landscape, contributions which enhance the lives of area citizens and attract visitors, creating a better future.

KZF Design

President & CEO: Doug Marsh

Address: 700 Broadway St
Cincinnati, OH 45202

Phone: 513.621.6211

Website: kzf.com

About: Founded in 1956, KZF Design has been in operation for 67+ years, a significant achievement in our industry, and our firm is stronger than ever. Serving our mission to “Design Better Futures” are 75 architects, engineers, planners, interior designers, and landscape architects. KZF offers comprehensive solutions to design challenges-key to our success delivering successful projects to clients. Our impact on our region’s quality of life is a source of genuine pride. KZF has touched every facet of what makes living, learning, working, playing in Greater Cincinnati unique. Iconic, award winning projects, such as University of Cincinnati Lindner College of Business, Smale Riverfront Park, Great American Insurance Headquarters attract national attention; our gratification comes from improving lives of people with whom we share a community.

KZF DESIGN

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Family & Private Business
Award Winners

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Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

MACKEY: Equipping Clients to Achieve Remarkable Success

Since its founding in 1983 by award-winning author Mackey McNeill, CPA, PFS, Bellevue, Kentucky's MACKEY, an innovative outsourced CFO firm, helps business nationwide achieve their epic goals.

On the way, Real Leaders Magazine named MACKEY one of the 200 Top Impact Companies in the US and MACKEY was among the first five companies in Kentucky and the first in Northern Kentucky to earn rigorous B Corp certification for verified performance, accountability and transparency. Certified B Corporations are leaders in the global movement for an inclusive, equitable and regenerative economy.

MACKEY serves private and family businesses that contribute to vibrant economies and it operates from the philosophy that its clients hold the key to their own prosperity. MACKEY's strong and talented team supports a forward-looking service model that resonates deeply with the current generation - its clients don't only want to make their numbers; they also want to impact the world. MACKEY helps clients aim high, forging true partnerships that synergize client knowledge with MACKEY's expertise. Harnessing and unleashing this impactful collective wisdom helps clients achieve not just their big goals, but also the epic ones that power the kind of transformative growth that ripples beyond the company into the community.

MACKEY first helps clients determine what success means for them and then it equips clients with the tools and knowledge they need to make confident decisions and accelerate their success.



From left: Mackey McNeill (Founder & CEO) with her grandchildren, Etta and Arlin, and daughter Sarah Grace Mohr (COO) of MACKEY

Those tools include deep accounting and finance knowledge provided by a dedicated CFO coach. The coach not only custom builds clients a comprehensive financial operating system that consists of strategic and annual planning, forecasting, historical reporting, and meaningful analysis but also provides them ongoing guidance on its effective utilization. Clients benefit from a financial operating system that reveals the potential results of

their decisions in concrete terms, guiding them toward the most advantageous path.

MACKEY measures its success by its clients' results - improved bottom line, increased cash flow and profits, less time working "in" their business, and a financially worry-free life. As these businesses thrive, owners gain greater freedom to relish life and make constructive contributions to their communities.

MACKEY

CEO: Mackey McNeill
Address: 601 Fairfield Avenue, Bellevue KY 41073
Phone: 859.331.7755
Website: www.mackeyadvisors.com
About: MACKEY is an innovative outsourced CFO firm serving entrepreneurs and business owners nationwide. Founded in 1983 by award-winning author Mackey McNeill, CPA, PFS, we were named one of the 200 Top Impact Companies in the US by Real Leaders Magazine and ranked on the prestigious INC 5000. In 2017 we went through a rigorous review process, earning a B Corp certification - a testament to the impact and trust built with the community and clients. Our core philosophy is that clients hold the key to their own prosperity, and we believe true prosperity extends beyond financial wealth. Through our innovative outsourced CFO services, personalized workshops, seminars, and coaching sessions, we equip businesses with the tools and knowledge to make confident decisions and accelerate success.



Congratulations to all the 2023 Goering Center Family & Private Business Award Honorees

Cheers!



Focusing on Core Values Keeps Mike Albert on the Move

Mike Albert, a family business founded in 1957, keeps its clients on the move by providing, maintaining and monitoring the fleets that deliver products, perform service calls, get to job sites and ultimately drive business forward. Mike Albert's clients benefit from improved customer satisfaction, enhanced branding and efficient and less costly operations, all of which make these companies more competitive and boost job creation in the local economy.

Mike Albert defines success across six different areas:

- Client satisfaction as gauged by surveys, competitive benchmarking and data on clients' operational efficiency, attained cost savings and sustainability metrics as compared to industry norms, to confirm the efficacy of Mike Albert's innovative practices.
- Never settling despite consistent high marks and longstanding clients.
- Associate happiness and retention as measured by an average employee tenure of 10.2 years.
- Financial performance, including gross revenue and, most importantly, a focus on profits obtained through growth and smart cost management, the latter of which have seen unit growth 12 years running and revenue growth for the past decade.
- Investment in innovation and thought leadership to maintain an industry leadership position, including the adoption of emerging technologies.
- Community impact, including support of many local causes through volunteer-



Chris Parrott (CMO) of Mike Albert

ing, clothing and food drives and more, as well as the adoption of electric vehicles that help companies prioritize sustainability and shrink their carbon footprints, improving the environment in our region.

- Living up to its professed values of client obsession, financial fixation, ownership, acting and operating as one team, seeking new and better approaches to achieve goals and respecting all people, the Earth and ethical codes.

To illustrate the power of those values in action, consider the remarkable success story of Mike Albert, an acknowledged industry leader helping

shape the future of fleet management. Founded in 1957 as one of the first companies of its type in the nation, Mike Albert has grown from a local vehicle leasing business into one of the largest and most respected fleet management providers in the United States and parts of Canada and Puerto Rico, innovating to provide clients with fleet management solutions that help streamline operations, reduce costs, ensure safety and improve efficiency.

By striving to always provide the greatest value to its clients, Mike Albert continually refines and innovates its services, allowing it to meet and anticipate the changing requirements of established clients and win new ones.

Mike Albert

CEO: Marty Betagole
Address: 10340 Evendale Dr
Cincinnati OH 45241
Phone: 513.554.2830
Website: Mikealbert.com
About: Our family business, founded in 1957, helps companies stay on the move. We provide, maintain and monitor the vehicles that enable companies to make product deliveries, perform service calls, get to the job sites, and ultimately drive their business forward. We do all of this in a manner that improves our clients' customer satisfaction, enhances their branding, and creates more efficient and less expensive operations. In short, we make other companies better. This sends ripple effects throughout our region in the form of jobs and other benefits associated with a stronger economy. While our family business serves companies all over the country, we're incredibly proud of our hometown clients, which include such respected brands as Macy's, Kroger and the Cincinnati Reds.







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For more information please contact:
John Mongelluzzo, Partner-in-Charge
jmongelluzzo@calfee.com | 513.693.4868 | calfee.com

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Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

Modern Ice Equipment and Supply Company, Inc.: Openness to Ideas Makes for a Remarkable Company

Modern Ice Equipment and Supply Company is the leading full-service supplier to the packaged ice industry and its mission is deceptively simple: To be remarkable to its customers, suppliers and employees.

As any business leader will tell you, companies don't become remarkable overnight. Modern Ice, which has a 55-year history, has done so by creating meaningful and sustainable value for its stakeholders, including its customers, employees, shareholders and the broader community.

Employees come first, and Modern Ice measures its success through employee satisfaction and engagement. Recognizing that each team member's role is integral to the prosperity of the company, it meets new ideas with an open mind. Modern Ice prioritizes employee wellbeing, professional development and opportunities for growth and advancement and it has a unique learning platform that helps both employees and vendors grow their skills. This employee focus has helped Modern Ice build a team with depth across multiple areas of expertise, allowing the company to tackle complex challenges, adapt to changing market conditions, provide turnkey solutions and deliver exceptional results to its clients.

Customer satisfaction and loyalty are Modern Ice's second measure of success. Through regular customer surveys, customer interviews to gather feedback and the monitoring of key performance indicators, Modern Ice ensures that it meets and exceeds its customers' needs, while gaining insights into areas where it can enhance customer experiences.



John Murphy (COO) of Modern Ice Equipment and Supply Company

The openness to ideas that Modern Ice demonstrates with employees extends to its clients. When one client was struggling to grow to meet demand, Modern Ice involved the client in the process to come up with solutions and listened to the client's ideas and expectations. Through collaboration and active client participation, Modern Ice came up with a plan, communicating with the client and making revisions to ensure that the final design met specific requirements. In a customer interview that serves as a testament to the dedication, deter-

mination and passion of Modern Ice's employees in providing unwavering support to its customers, the client said, "I realized that these people would work with me. You feel important at that point."

Modern Ice also recognizes its place in the community, and as a socially responsible organization, it gives back to local, regional and national organizations to make a meaningful and lasting impact on its community and beyond. Remarkable, indeed.

Modern Ice Equipment and Supply Company

CEO: Gary Jerow
Address: 5709 Harrison Avenue, Cincinnati OH
Phone: 513.367.2101
Website: Modernice.com
About: Established in 1968 in Cincinnati, Modern Ice Equipment and Supply Company, Inc. is now the leading full-service supplier to the packaged ice industry. Currently, our two main offices, main warehouse, education / training facility - Modern Ice University, and approximately 75% of our employees are in the Greater Cincinnati Area. Our mission is to be "Remarkable" to our customers, suppliers, and employees. We will continue to embrace and lead innovation in the industry with talented and driven employees, a worldclass supply chain, and a facility for industry education.



Plan your exit, welcome your future

You've been building your business for years. It may even feel like part of your identity. But exiting your business doesn't have to mean losing part of who you are. It should mean gaining the freedom to explore new passions and opportunities. With proper planning and the right Team in place, tomorrow's possibilities are endless.

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Helping Business Owners Plan for Retirement: Monarch Financial Advisors

At Monarch Financial Advisors, founder Sue Burnett uses her qualified plan expertise, insurance and investment experience and passion for teaching to provide retirement strategies for business owners.

Each year, Monarch Financial Advisors sets goals to achieve:

- Financial success as measured by increasing gross revenue at least 10% per year and limiting expense increases to less than 5% per year
- Knowledge-based success, focused on educating business owners on the pros and cons associated with the nine retirement plan options available to them. The goal is that, after each meeting, clients and partners walk away having learned at least one thing about qualified plans that they did not know previously
- Personal success in the form of a strong, positive brand as gauged by new contacts and clients
 - Participating in and donating to the firm's Run/Walk for a Reason series, family-oriented fun runs that bring awareness to and accept donations on behalf of local charities and nonprofits
 - Passing the "mirror test," Sue's daily assessment of whether that person in the mirror is adhering to Monarch's core values of integrity, excellence, honesty, dedication, creativity and compassion – in essence, does she like who she sees?



Susan Burnett (CEO/Owner) of Monarch Financial Advisors

Thus far, Sue's met her annual goals, and is very proud of who she sees in that mirror! She's not the only one - Monarch received the 2021 Woman-Owned Business of the Year and the 2022 Emerging Business of the Year awards from the Little Miami River Chamber Alliance and Sue was selected to participate in the LEAD Clermont program from the Clermont County Chamber.

Sue attributes Monarch Financial Advisors' success to its two competitive advantages:

- Depth and breadth of knowledge, allowing Monarch to offer objective advice for all aspects of retirement plans. Sue's credentials, experience, and certifications

allow her to provide thoughtful, strategic recommendations relating to plan design, investments within the plan, and insurance protection.

- Independence, which enables Monarch to offer a wide range of investment and insurance options to business owners based solely on their own goals, objectives and dreams

Through education on the pros and cons about their qualified retirement plan options, Monarch partners with business owners to determine which strategy is right for them. As their financial future improves both personally and professionally, Monarch is positively impacting not just individuals but also the wider community, one business at a time.

Monarch Financial Advisors

CEO/Owner: Susan L. Burnett

Address: 6234 Emery Crossing, Loveland, OH 45140

Phone: 513.502.2637

Website: Monarchfinancialadvisors.com

About: Monarch provides retirement strategies for business owners – whether they're looking for additional deductions, a boost in retirement savings, or protection for their family and business. Sue Burnett founded Monarch Financial Advisors as a way to combine her qualified plan expertise, insurance and investment experience, and passion for teaching. As an independent advisor, our recommendations are based on the business owner's goals and objectives. We are passionate about helping others – from training sessions at local businesses, to fun-runs for local non-profits, giving back is an integral part of our business. We have won multiple Chamber awards, and have 5-star ratings, as we continue to pursue our vision: to be the premier retirement partner for business owners.

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2023 FAMILY & PRIVATE BUSINESS AWARDS

Paul Hemmer Company: Differentiating to Not Just Survive but to Thrive

Paul Hemmer Company, an award-winning provider of construction services in the distribution, manufacturing, medical, office, retail, and institutional markets in Greater Cincinnati since 1921, knows that successfully differentiating itself is the key to not just surviving but also thriving in a competitive space. To do that, Paul Hemmer Company measures success in four areas:

- Customers – Paul Hemmer Company’s focus on customer satisfaction has earned it repeat business of customers and helped it win business from new clients, with which leadership works to establish lasting relationships.
- Community - Paul Hemmer Company thrives in the community, where it measures success both in the form of a project that has a positive impact on the community and in participation with civic, charitable, or other community-based organizations.
- Employees – Retention and growth are how Paul Hemmer Company, recognized in the Cincinnati Enquirer and Cincinnati.com 2023 Best Places to Work list, measures success with employees intentionally sought out for their entrepreneurial spirit, which the company supports with continuous investments in training and technology to drive professional and personal growth.
- Profits – Over the course of 100 years in business, Paul Hemmer Company has



From left: Paul Hemmer Jr. (CEO) and John Curtin (President) of Paul Hemmer

learned that when it’s successful with customers, community, and employees, profitability will follow.

The entrepreneurial nature of Paul Hemmer Company sets the tone for the entire organization, fostering ownership and accountability as well as good communication, all of which combine to deliver total customer satisfaction. This competitive advantage is boosted by the company’s lean, closely held ownership structure, which allows it to be nimble and react to changes in the marketplace while remaining focused on long-term plans.

Also helping Paul Hemmer Company retain a

competitive edge is its complementary portfolio of business units: Hemmer Construction Company, Roebling Development Company, and Building Management Partners. The knowledge and insight gained on the development arm of the business help fine-tune strategy and execution on the construction side and vice versa, while the facilities management group provides everyday case studies on superior design and building practices to the development and construction groups.

This circle of life knowledge of a facility is unique in the industry and enables Paul Hemmer Company to be a value-add partner to each of its customers.

Paul Hemmer Company

CEO: Paul W. Hemmer Jr.
Address: 226 Grandview Drive, Fort Mitchell, KY 41017
Phone: 859.341-8300
Website: www.paulhemmer.com
About: Paul Hemmer Company has been a construction leader in the Greater Cincinnati region since 1921. Hemmer is a premier provider of construction services in the medical, distribution, manufacturing, office, retail, and institutional markets throughout the region. Most clients choose Hemmer because of its ability to provide single-source design/build solutions for their construction needs. Hemmer’s success lies in an ability to get the job done by managing and directing projects from the earliest conceptual idea through completion utilizing a fast-track approach— on time, within budget, and with Total Customer Satisfaction.



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2023 FAMILY & PRIVATE BUSINESS AWARDS

Solid Blend Technologies: Caring for Clients by Caring for Its Team

Since 1999, Solid Blend Technologies, a family-owned, WBENC-certified business, has delivered proven water management services and systems to control waterborne pathogens like Legionella, protect drinking water and water treatment programs to fight scale-causing mineral deposits, bacteria and corrosion in HVAC water systems. Their mission and passion are to safeguard water because that ultimately saves lives.

With a primary focus on hospitals, Solid Blend Technologies also works with schools, long-term care facilities and others in established buildings and systems as well as in new construction projects, winning the highly competitive Associated Builders and Contractors Excellence in Construction Awards® with both the Eagle Award and Merit in Construction.

Believing that the best way to take care of clients is to take care of the team, Solid Blend Technologies leads with a people first, revenue second mentality. Through its Guardians initiative, it focuses on keeping, guarding, and retaining its talented people by cultivating an environment where people enjoy coming to work and enjoy the people with whom they work. Open lines of communication help keep the team aligned with the company's vision, mission, core values, and direction and there are regular opportunities for employees to provide their feedback.

The employee commitment goes further than that. Knowing that its customers count on the Solid Blend Technologies team to be up to date on standards, rapidly changing laws and regulations, technology and the latest in water management, it



Solid Blend Technologies President/Founder, Lois Elrich (seated to the right), standing behind her, husband and VP/Co-Founder, Ken Elrich.

commits to more than 1,000 hours of continued education for its employees each year. This includes personal and professional development, industry-specific degrees, certifications, informational seminars and more.

One hundred percent of health benefits for employees and their families paid for by Solid Blend Technologies and employees have opportunities to support several local nonprofits and enjoy internal celebrations and fun outings.

That people-first focus has been a winning strat-

egy, with the company earning dozens of work and workplace awards on the way to ensuring clients have clean water. As Ohio's water management leader, Solid Blend Technologies has delivered proven systems that have protected the public's health with effective treatments against waterborne pathogens and its kept HVAC equipment operating safely and efficiently. Those work streams directly impact the health and safety of the community and it's that responsibility that drives Solid Blend Technologies' supportive, client-immersed, passionate team to continue doing valuable work.

Solid Blend Technologies

Vice President and Founder:
Ken Elrich

Address: 10 Granite Dr.,
Dayton, OH 45415

Phone: 937.264.8453

Website: solidblendtechnologies.com

About: Since 1999, we've delivered proven water management services and systems to control waterborne pathogens like Legionella, protect drinking water, and fight scale-causing mineral deposits, bacteria, and corrosion in HVAC water systems. Our mission – and our passion – is to safeguard water because ultimately, that saves lives. Our purpose is to create an environment where our team, clients, and community thrive. We respect each other's input, hard work, collaborative relationships, and the power of snacks to make meetings more enjoyable. We believe in a "leading with people first, revenue second" mentality. We are a proud family-owned, WBENC-certified business. We also believe everyone deserves an equal chance no matter their circumstances, and we are honored to work with Good Shepherd Ministries and other local nonprofits.



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Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

Culture is the Bedrock for Success at The Metalworking Group

Founded in 1982, contract metal fabrication manufacturer the Metalworking Group (MWG) recognizes that its present and future success relies on three key elements working in harmony:

1. An environment that encourages employees to contribute and execute their expertise while fostering a culture of exceptional work ethic
2. Investment in the latest tools and attraction and retention of talented individuals who thrive on being at the cutting edge
3. Embrace of the Lean Manufacturing philosophy to eliminate waste, add value to customers and continuously improve products, processes and people

Its relentless pursuit of success in those three elements has earned MWG recognition as a Best Place to Work as well as a reputation for accomplishing what many of its competitors are unwilling to attempt, something MWG's CEO underscored in a company-wide email: "We will find a way. Finding a way is something that, as a company, we excel at. It is why many of our customers keep coming back to us. We will go above and beyond to find solutions, solve problems and overcome obstacles. We embrace challenges routinely because few others will. It drives our growth and enables investment in our people and equipment—the lifeblood of our business."

MWG team members recently demonstrated their exceptional ability to innovate and persevere in the face of challenges to pursue success. When a long-time vendor announced a 300% price increase on a part that would significantly impact



Brian Dubay (President) of The Metalworking Group

production time and customer cost, MWG's team worked together to produce the part itself using a different process that pushed the limits of its in-house equipment. MWG's skilled employees persevered and were able to transition all manufacturing of this high-volume part in-house, circumventing the three-fold price increase from the vendor and drastically reducing the lead-time, while also minimizing transportation waste and enabling enhanced quality control. This achievement exemplifies MWG's commitment to finding solutions and pushing boundaries in the pursuit of excellence.

MWG attributes this competitive advantage to

its culture, which is driven by:

- Experienced, home-grown leadership and staff
- Investment in people and technology for sustainable growth
- An environment of continuous innovation that cultivates first-class expertise in manufacturing solutions

With that culture as its bedrock, MWG fulfills its mission to keep its customers satisfied and its employees inspired as it continues to grow and innovate, propelling the company's performance and growth.

The Metalworking Group

CEO: Doug Watts

President: Brian Dubay

Address: 9070 Pippin Rd,
Cincinnati, OH 45251

Phone: 513.521.4114

Website: www.metalworkinggroup.com

About: Metalworking Group, established in 1982, is a local contract metal fabrication manufacturer. MWG collaborates closely with customers every step of the way and acts as a trusted extension of their manufacturing team. This commitment to customer satisfaction drives the company to employ innovative production methods and efficient processes while embracing emerging technologies for continuous improvement. MWG's team embodies respect, integrity, and positive perseverance. Leveraging state-of-the-art machinery, MWG's extensive industry knowledge and team of skilled craftsmen and women enable MWG to deliver superior customer experience and continue to build on over 40 years of growth.



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Family Businesses Are Not Only Big, But Among America’s Longest Lasting Enterprises, Study Shows

By Pat Soldano
A little-known secret is America’s largest employer, family business, is also likely its most stable, and longest lasting.

Family businesses account for 83.3 million jobs, or 59% of the country’s private workforce, but new research also tells a story of business longevity, with 74% of family businesses operating for 30 years or more, and many for more than 100 years.

Those are big numbers to consider: family businesses make up nearly 60% of the private workforce and nearly 75% have been in business for three decades or more.

The research, part of our Family Enterprise USA Annual Family Business Study 2023, asked 571 family businesses or family business offices from across the country, “How many years has your family business been in operation?”

The results paint a picture of family businesses as among the most resilient and stable businesses in America.

Very few ongoing family businesses are start-ups.

In fact, only 5%, were less than 10 years old, while 13% were over 100 years old, the research showed.

Most multi-generational family businesses are into third and fourth generations, with some 61%

between 30 and 100 years old, while 74% are in operation for more than 30 years.

This year’s numbers show once again the resiliency and longevity of our country’s family businesses. Data shows family businesses tend to be more stable than most, too, they keep jobs, add jobs, pay better than average wages, and give back to their communities, all of which are strong arguments to keep our family businesses thriving.

In addition to longevity, the survey, sponsored by Squire Patton Boggs and Brownstein, both leading law and lobby firms advocating for family businesses, found 91% of family businesses kept jobs this year and 61% added jobs during a high-inflationary period over the last 12 months. Only 9% of family business respondents lost jobs.

Family businesses pay better and are strong in their communities, too.

Our study found 46% of family businesses pay “above average” wages and benefits. It was also found 72% have “generational employees,” that is, employees working for family businesses for multiple generations. The survey found 82% donated funds to local charities or local chapters of national charities.

As for the health of family businesses, 65% of respondents expect to grow this year and 71% saw their business increase last year, even with pandemic restrictions.



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Advocating for Families in DC

Family businesses are not small either.

Nearly 40% of the respondents said they had annual revenues of \$21 million or more. The next generation is stepping up to run things, with 66% of family businesses saying they have, or had, passed the business onto the next generation, a nearly 30% jump from the 2022 survey findings.

The breakdown of family business industries is: 26% in manufacturing, 14% in construction/facilities, and 7% in real estate. Agricultural businesses made up 5% of respondents. America’s multi-generational family-owned industries contribute \$7.7 trillion annually to the U.S. gross domestic product, research shows. It’s another big number.

Our legislators are now catching on to the power of family businesses.

This is evident by the newly formed bipartisan Congressional Family Business Caucus. This Capitol Hill voice for family business had its third meet-

ing in September, and nearly 30 new legislators have signed up to be part of it and to understand what family businesses issues are most pressing.

This year, the study found the biggest worry resided in the country’s tax policies, with 50% of respondents saying high personal income taxes were the number one concern, up from 45% a year ago.

With the new caucus in place, we hope legislators will begin to see the full size, stability, and power of our country’s family businesses. We hope they will begin to craft policies that keep this economic engine running well into the future.

Pat Soldano is President of the bipartisan Family Enterprise USA and Policy and Taxation Group, both based in Washington, DC. For the full details of the new “Family Enterprise USA Annual Family Business Survey 2023” can be found at www.familyenterpriseusa.com.



Family Enterprise USA

Research Advocacy Legacy

Your Voice on Capitol Hill

Advocating for
Generationally-owned
Family Businesses and
Their Lifetime of Savings



We focus on burdensome income taxes, excessive regulation, and lowering or eliminating the estate tax. Family Enterprise USA helped in the formation of the bipartisan Congressional Caucus on Family Business. The caucus works with Congress to raise awareness and to educate our legislators on critical issues facing all family businesses.

Join us. Make our voice stronger.

Contact: John Gugliada jgugliada@family-enterpriseusa.com
P: (202) 738-4916 Family Enterprise USA is a 501(c)(3) organization.
familyenterpriseusa.com



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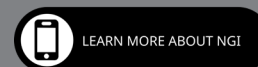
“*The Next Generation Institute™* helped us develop the language and the tools necessary to tackle some really tough issues and shifted our focus to work on our business versus just in it.”

Lauren Johnson-Lake, Cincinnati Container Company

Join us September 20 for a complimentary Overview, where you will discover all that the Institute can do for you.

The Next Generation Institute (NGI)® kicks off November 2023.

To learn more, call David Miller, Goering Center Membership Director, at 513-556-5648.



**GOERING
CENTER**

goering.uc.edu

The Goering Center is a valued partner delivering knowledge, connection and community.

Goering Center for Family & Private Business

Goering Center to Name Seventh Annual Larry Grypp Rising Leader

Nine of the region’s future generation of leaders will be honored at the 24th Annual Family & Private Business Awards, with one of the nine, selected by popular vote, to receive the 2023 award.

One of a leader’s key responsibilities is to identify and develop future leaders. The Goering Center demonstrates its commitment to the region’s future generations of leaders by bestowing the Larry Grypp Rising Leader Award. Named for past president Larry Grypp in acknowledgement of his leadership, this award is given to one Rising Leader among nine, who were nominated by their member company, for demonstrating success at advancing one of the Goering Center’s 10 Best Practices of Successful Family and Private Businesses.

The Seventh annual Rising Leader nomination process ran from October 2022 to June 2023. Nominations were due by the last business day of each month, and an independent panel of judges selected one Final-

ist each month, for a total of nine Finalists.

The Eighth annual nomination process will begin in October 2023, providing an excellent opportunity to showcase the achievements of strong rising leaders throughout the Greater Cincinnati community. Nominees must be on a leadership or succession track of a family or private business, and assume a senior leadership position within the next 5 - 15 years.

Cultivating bench strength is critical to long-term success. Investing in a rising generation of leaders lays a foundation for success and, by acknowledging the accomplishments of these rising leaders, teams become engaged, motivated, and they thrive. All Rising Leader Finalist shape the future of their respective companies and collectively grow the vibrancy and economy of our region.

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GOERING CENTER 2023 RISING LEADER

FINALISTS

GOERING CENTER
RISING LEADER

FINALIST

JUSTIN AUSTIN
PARTNER | MIDWEST REGIONAL SELECT PRACTICE LEADER, USI INSURANCE SERVICES

BEST PRACTICE:
BUSINESS GROWTH

GOERING CENTER
RISING LEADER

FINALIST

ERICA HUENTELMAN
EXECUTIVE ASSISTANT, DONNELLO MCCARTHY ENTERPRISES

BEST PRACTICE:
LEADERSHIP DEVELOPMENT

GOERING CENTER
RISING LEADER

FINALIST

CATHERINE MILLER
WEALTH ADVISOR, BARTLETT WEALTH MANAGEMENT

BEST PRACTICE:
GIVING BACK

GOERING CENTER
RISING LEADER

2023
FINALIST

ZACK POSTMA
RELATIONSHIP MANAGER | MIDDLE MARKET FIFTH THIRD BANK

BEST PRACTICE:
DYNAMIC BUSINESS STRATEGY

GOERING CENTER
RISING LEADER

FINALIST

SETH PRIESTLE
VP: CHIEF COMPLIANCE OFFICER, PENSION CORPORATION OF AMERICA

BEST PRACTICE:
GIVING BACK

GOERING CENTER
RISING LEADER

FINALIST

ADAM REYNOLDS
DIRECTOR OF CLIENT ENGAGEMENT, MACKAY ADVISORS

BEST PRACTICE:
BUSINESS GROWTH

GOERING CENTER
RISING LEADER

FINALIST

JEREMY RIDDLE
VICE PRESIDENT, ROEHR INSURANCE

BEST PRACTICE:
BUSINESS GROWTH

GOERING CENTER
RISING LEADER

FINALIST

CODY STEELE
OPERATIONS/SALES, HILLTOP BASIC RESOURCES

BEST PRACTICE:
BUSINESS CHARTER

GOERING CENTER
RISING LEADER

FINALIST

BILLIE VEGA
OPERATIONS MANAGER, SWEETS & MEATS BBQ

BEST PRACTICE:
PERFORMANCE MANAGEMENT SYSTEM

Goering Center for Family & Private Business**2023 FAMILY & PRIVATE BUSINESS AWARDS**

Verst Group Logistics Named to the Goering Center's Family Business Hall of Fame



One of the largest logistics firms in the region to be inducted at the Goering Center Family and Private Business Awards on September 11 at Hard Rock Casino Cincinnati

In 1966, William G. "Bill" Verst purchased a local trucking firm and began what would ultimately become Verst Logistics, a customer-first, full-service logistics provider. Throughout its significant growth, Verst has retained an unwavering commitment to excellence for customers, employees, and the community.

With the legacy of a 57-year-old family business, Verst has over 2,200 employees, 28 national warehouse locations, and over 8 million square feet of warehouse space.

Leading the charge from their headquarters in Walton, Kentucky is second generation Paul Verst. He took on the leadership role in 1993 from his father, Bill. Since that time, he has overseen the expansion of the company's strategic plan, real estate, and customer solutions. Of utmost importance to Paul is the commitment to putting the customer first, providing a family-focused company culture and giving back to the community.

The Verst family commitment to community service and philanthropy is a tradition started by his father and continues today with leaders serving on numerous boards for local universities, churches, schools, and industry trade associations. "Giving back has always been part of our family and company DNA," says Verst, who currently serves on Xavier University's board of trustees, Horizon Community Funds of Northern Kentucky, Northern Kentucky Regional Alliance, and the Kenton County Airport Board, which manages the Cincinnati/Northern Kentucky International Airport.

From the start, Verst has been staffed by honest, hardworking people always ready and eager to do the right thing for customers. Together, they have earned the company a reputation for excellence based on a culture instilled by the founder. This culture is rooted in the core values that guide employee actions. These values include the continuous development of innovative solutions; a passion for delivering exceptional service; respecting the time, knowledge, and concerns of others while maintaining integrity and trust; a zero-harm safety goal to prevent injury or adverse impact to customer, environment, or community; and teamwork that emphasizes individual and group accountability toward a common objective. "Our core values drive everything we do within our company," says Verst. "They represent our living and breathing bible on how we operate and run the company."

Verst's dedication to doing the right thing has ultimately earned it an array of accolades. These include but are not



From Left: Paul Verst (CEO), Chris Verst (Director of Transportation), Kyle Stadtmiller (Vice President, Accounting), and Jim Stadtmiller (CFO) of Verst Group Logistics

GREATER CINCINNATI FAMILY BUSINESS HALL OF FAME AWARD

"Our core values drive everything we do within our company.

They represent our living and breathing bible on how we operate and run the company."

– William G. "Bill" Verst

limited to, being named one of the area's top private companies and largest logistics firms by *Cincinnati Business Courier*, and an Inbound Logistics Top 100 3PL Third-Party Logistics Provider for over a decade.

The same standards that have contributed to Verst's success underlie its fabric and makeup in the years to come, as the third-generation steps into Verst

leadership roles. By following these values, this family business will continue to make a positive difference for clients, partners, employees, and communities wherever it operates.

The Goering Center has been serving family and private businesses for thirty-four years. During this time, we have observed companies and individuals who

have been instrumental in their community support and leadership. Recognizing long-term community impact is the goal of this Greater Cincinnati Hall of Fame.

"Verst Logistics exceeds in all categories of our criteria and is an obvious choice for this recognition. Paul Verst, his family and his team demonstrate leadership in philanthropy, community service, growth of employment, and in carrying a flag for the region enhancing our community image. We are proud and excited to induct Verst Logistics into the Goering Center Hall of Fame!" said Carol Butler.

VERST GROUP LOGISTICS

300 Shorland Drive,
Walton KY 41094

Verstlogistics.com

Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

HONORABLE MENTIONS

2023 Family & Private Business Awards Finalists, we could not go without mentioning

**AMERICRAFT MANUFACTURING CO.**

Jim Ceddia, President/CEO
7937 School Rd,
Cincinnati, OH 45249
513.489.1047
www.americraftmfg.com

Americraft Manufacturing has been manufacturing quality industrial fans and ventilation products since 1946. Our years of proven experience, strong national reputation and excellent customer service are the foundation on which we manufacture quality fan and ventilating products. Americraft products operate in hundreds of different applications across the United States and throughout the world. Each year Americraft gives back to the community in different ways. Employees contribute and decide where we focus our efforts, choosing charities with special connections. We also work with our local church community to provide activities and events for parishioners, and meals for students during the summer months.

**CUSTOM DESIGN BENEFITS, INC.**

Julie Mueller, CEO/ President
5589 Cheviot Rd,
Cincinnati, OH 45247
513.598.2929
www.customdesignbenefits.com

Custom Design Benefits (CDB) is a dynamic, service-oriented organization specializing in the administration of self-funded health benefits, compliance services such as FMLA, COBRA and consumer driven services. Founded in 1991, Custom Design Benefits is the area's largest independent Third Party Administrator servicing brokers and employers in Ohio, Kentucky and Indiana and is a WBENC-Certified Women's Business Enterprise. We are recognized as a national leader in the development and implementation of referencebased pricing plans and other innovative cost containment services.

**AUXILIO INC.**

Ed Dollin, CEO
11260 Cornell Park Dr Suite 706,
Cincinnati, OH 45242
513.273.4522
www.auxilioservices.com

Auxilio was created when the owner broke away from a partnership with a company that failed to realize the customer needed to be treated fairly, with respect and most of all to be a budgetary partner. Auxilio – the definition of this Latin word means "To Help" and our approach since developing this spin off company has been to help the clients and communities we work with. Auxilio works with our customers as a budgetary and business partner to provide the non-instructional services that are required to operate a district effectively and allow them to focus on the core business of educating students. This company has grown from 22 employees in 2012 to a company that will exceed 700 employees over the next 12 months. We are here to help!

**FLOTTMAN COMPANY**

Tom Flottman, CEO
720 Centre View Blvd,
Crestview Hills, KY 41017
859.331.6636
www.flottmanco.com

Located in Crestview Hills, Kentucky, **Flottman Company** is a well-established commercial printing and marketing services company. With a rich history dating back to its founding in 1921, our company has successfully served clients for over a century. Flottman Company offers a comprehensive range of services encompassing printing, packaging, and marketing. We excel in various areas, including custom printing, commercial printing, digital printing, variable data printing, graphic design, and direct mail campaigns. Our expertise extends to diverse industries such as pharmaceuticals, healthcare, manufacturing, education, and non-profit organizations

**AXIS INTERIOR SYSTEMS**

Michael Ansari, CEO
12 Kiesland Ct,
Hamilton, OH 45015
513.645.1110
www.axisinteriorsystems.com/inner/services.htm

Axis Interior Systems, Inc. is a full-service commercial flooring company founded in 2002 in Cincinnati, OH by passionate leaders and has prospered with our empowered employees. As a diverse, multigenerational company, our vision is to be a cutting-edge and world-class enterprise providing exceptional service. Our mission is to create an enduring enterprise by establishing exceptional customer service, quality craftsmanship and long-lasting partnerships with our employee-owners, clients, vendors & business partners. Axis employee-owners are aligned with our vision and mission, providing our clients a unique value with their dedication to deliver excellence at every point. Our quality craftsmanship has led us to various design awards, showing our success as a cutting-edge company.

**INTRUST IT**

Tim Rettig, CEO
9850 Redhill Dr, Cincinnati, OH 45242
513.469.6500
www.intrust-it.com

Intrust provides IT services to companies in the Greater Cincinnati region since being founded in 1992 by Tim Rettig. Focusing on customer success, Intrust brings the expertise of 60+ Employee Owners to improve client efficiencies and reduce risks to their business. Committing to staying at the forefront of Cybersecurity issues, Intrust engages clients with a true partnership mentality. Intrust is a full-service IT department, providing helpdesk support and strategic IT consulting to small/medium sized businesses. For larger organizations, Intrust is the best friend to the on-site employed IT staff, supplementing when needed, and filling any knowledge gaps. Intrust has been continuously recognized for a progressive internal culture while maintaining excellent customer service ratings. Proudly maintaining a 99% or higher client satisfaction rating every single month for over 3-years, and an employee retention rate unrivaled in the technology industry, Intrust creates an engaging environment where both clients and employees want to stay.

**BARTLETT WEALTH MANAGEMENT**

Jim Hagerty, CEO
600 Vine St # 2100,
Cincinnati, OH 45202
513.621.4612
www.bartlett1898.com

Bartlett Wealth Management is a registered investment advisory firm located in Cincinnati, OH with additional offices in Chicago, IL and Louisville, KY. Since its founding in 1898, Bartlett has provided its clients with personalized, team-based guidance in investment management, financial planning, and holistic wealth management services. Bartlett believes that wealth has a purpose, and its team of experienced advisors work with clients to get to know their unique goals, challenges, and overall financial picture to chart a course. By integrating purpose into the conversation, Bartlett seeks to align its clients' wealth with what brings them joy.

**JOURNEY ADVISORY GROUP**

Tyler Lang, CEO/ President
15 W 5th St, Covington, KY 41011
859.888.0356
www.journeyadvisory.group

Journey Advisory Group is an employee and family-owned local business. Launched in 2013, Journey Advisory Group is a SEC Registered Investment Adviser* specializing in investment management and financial planning. We partner with our clients to meet the needs of their life's journey: wealth management, college, retirement and estate planning, tax management and insurance. Clients are often faced with the unappealing choice between small, independent firms lacking expertise and depth, and large, impersonal, unresponsive organizations. Journey provides a unique alternative: sophisticated planning and investment expertise combined with exceptional personalized service. We are committed to providing our clients with active, insightful and ongoing investment and planning support throughout life's journey. As a local company, we give back to the communities we serve by supporting local organizations and contributing to community initiatives. We are passionate about staying involved in our local community supporting a range of community events.

**CAR-PART.COM**

Jeff Schroder, CEO/Founder
1980 Highland Pike,
Ft. Wright, KY 41017
859.344.1925
www.car-part.com

Car-Part.com is a software company based in Ft. Wright, KY, and was the 1st recycled parts marketplace on the Internet. Now in our 27th year, we are the largest. Car-Part is a leading provider of software and web solutions for auto recyclers. Our product suite covers end-to-end auto recycling workflow, helping auto recyclers buy/sell parts, manage inventory, and their businesses. Services include inventory promotion, online inventory searches, web design/hosting, and email. Our solutions make inventory available to potential buyers (body shops, insurance adjusters, core buyers and retail customers). Car-Part provides the Integrated Car-Part Pro (iPro) marketplace to the collision repair industry. Auto insurers and repairers use iPro to find the best part based on condition, location, availability, brand, and price. iPro integrates with 3 estimating systems and provides detailed analytic reports. Car-Part voted "Best Place to Work KY 2021, 2022, #1 in 2023", "Regional Top Workplace", "Cool Place to Work".

**JOURNEY STEEL, INC.**

Barbara Smith, President
7660 Production Dr,
Cincinnati, OH 45237
513.731.2930
www.journeysteel.com

Journey Steel is a self-performing steel fabrication, erection and UAS company, headquartered in Cincinnati, founded in 2009 on passion, integrity, and dependability. Bringing over 65 years of combined experience in the construction industry we do both structural and miscellaneous steel – beams, columns, joist, decks, ladders, stairs, railings. We added drones to do inspections, surveying, 3D scans, thermal scans, precise mapping, aerial photography as well as marketing, maintenance, and inventory beyond the construction industry. Journey is committed to deliver on-time, on-budget, quality, and safety-driven projects to the client every time. Our goal is to change the world one young person at a time by building projects and supporting dreams in the community in which we work, play and live. In 2016 we established Journeys Soaring Impact, a non-profit pre-apprenticeship program that targets inner-city high school seniors and trains them for a career as a union ironworker, bringing our vision to life.

Goering Center for Family & Private Business

2023 FAMILY & PRIVATE BUSINESS AWARDS

HONORABLE MENTIONS

2023 Family & Private Business Awards Finalists, we could not go without mentioning



KINGSGATE LOGISTICS

Jeff Beckham, CEO/ President
2900 Reading Rd Suite 360,
Cincinnati, OH 45206
513.874.7447
www.kingsgatelogistics.com

Kingsgate Logistics is a family-operated, third-party logistics company created with one goal in mind: providing superior customer service and logistics solutions. Founded in October 1986 by Merry and Tom Beckham, we are a privately held business still operated by the founding family who started with three basic principles – hard work, exemplary service and upholding the highest levels of integrity. We remain grounded by these principles, but continually advance with investments in our employees and innovative technology. However, one thing stays the same — our personal commitment to client satisfaction. We find ways for businesses to move freight faster, safer and smarter, through our leading-edge logistics technology. We transparently collect, evaluate and share data about our customers' shipping needs, so that each shipment they make is informed by the last.



ROEHR INSURANCE

Alvin Roehr, CEO/ President
4642 Ridge Ave,
Cincinnati, OH 45209
513.985.4200
www.roehrins.com

Since opening in 2012, **Roehr Insurance** has grown to be one of the largest, independent insurance consulting and brokerage firms in the Midwestern United States. Headquartered in Cincinnati, Ohio, we serve 3,000+ businesses and individual clients in 50 states and 14 countries. Our clients span a wide array of industries including - hospitality, manufacturing and distribution, technology, construction, government contractors, real estate, renewable energy, non-profits, staffing services and trucking to name a few. Our employees, better known as "teammates," have an average insurance industry experience level of 10 to 30+ years with varying expertise in underwriting, claims, risk management, captives and contractual risk transfer. Many of our teammates have been personally recognized by clients and carrier partners for their commitment to service and integrity.



KIRSCH CPA GROUP, LLC

John Kirsch, CEO
2 S 3rd St #400,
Hamilton, OH 45011
513.858.6040
www.kirschcpa.com

Kirsch CPA Group is the premier public accounting firm serving small and medium size businesses and nonprofits in Ohio, Indiana, and Kentucky. Our service to organizations is to meet their needs in Accounting & Payroll, Tax Advisory, Audit & Assurance, and Business Advisory. Our approach is to be forward thinking, holistic, and results oriented. Starting as a one-man CPA in 1991, the firm has grown to a team of 46 members, with 3 partners and 22 CPA's. Kirsch CPA Group is one of the top 20 largest firms in the Cincinnati area and has been announced as Business Courier's Best Places to Work Finalist for five years in a row. Recognition has been given by Inside Public Accounting in their annual review of public accounting firms across North America for being the Best of the Best for seven years and a Top 400 Firms in Public Accounting for three years.



SAGE YOGA HOT

Jessica Star, Founder
1900 Race St,
Cincinnati, OH 45202
513.620.5938
www.sageyogahot.com

Sage Yoga was founded in Covington in 2016; as Sage Yoga Hot, we now offer a full schedule of hot yoga and reformer pilates in Over-the-Rhine, Newport, and at Harper's Point. This women- and minority-owned business has grown from a single studio with four teachers to a network of studios with some 40 certified instructors whom we've trained in a Sage-specific method and approach. From the start, Sage has welcomed everybody and every body, centering inclusion in every aspect of the practice of yoga. Beyond fostering a welcoming environment for everyone, we also model this commitment in the way we instruct yoga — our teachers remind clients that there is no 'perfect' yoga pose, only what works best for a given client in the moment. We consistently offer classes that are more demanding than any in Cincinnati and Northern Kentucky, but relentlessly make space for wherever any student is on that day.



MERCHANDISING SERVICES CO.

Mike Buschermann, President/ Owner
10999 Reed Hartman Hwy,
Cincinnati, OH 45242
866.479.8246
www.merchandising-servicesco.com

Behind every product placement/ positioning and store support service is the heart of our company, the **MSCO** family members! Working for MSCO is so much more than just a job! We offer positions in a family-focused, engaging, rewarding, supportive and inclusive work environment, along with a generous group health package, unprecedented time off, internal growth opportunities, and competitive compensation packages. MSCO is rapidly expanding. We operate in forty-six states, with a heavy concentration in the Northeast, Midwest, Southeast, and Southwest. We are looking for passionate, enthusiastic, diligent team members to join the MSCO Family! You will be happy you did; we are sure of it!



STEINHAUSER

Tara Halpin, CEO/ Owner
207 E 4th St, Newport, KY 41071
859.491.7900
www.steinhauserinc.com

Steinhauser is a fourth-generation, 100% women-owned custom label and shrink sleeve printer based in Newport, Kentucky. With a history spanning 118 years, we have established ourselves as a trusted supply chain partner known for agility, service, and consistency. Our capabilities include narrow-web UV flexographic and HP Indigo printing to cater to both short and long-run orders, serving the Beverage, Spirits, Personal Care, and Household markets with high-quality labels. We are dedicated to delivering an exceptional experience to every customer, guiding them through the entire process with personalized attention and care. Our culture of integrity, inclusion, and family values fosters a collaborative partnership for mutual success. We pride ourselves on delivering an exceptional experience to everyone, every day. When you choose Steinhauser, you're not just selecting a printing partner; you're forging a collaborative relationship built on trust and integrity.



OMNI TECHNOLOGIES, INC.

Dan Culbertson/ Geoff Culbertson,
Co-Owners
779 Rudolph Way,
Greendale, IN 47025
812.539.4144
www.omnitechologies.com

OMNI Technologies improves the lives of people around the globe by designing and manufacturing equipment components that help make everyday life better and easier. OMNI has provided engineering and custom manufacturing services to fortune 500 companies since 1979 bringing daily use items from bottled water to shampoo to the shelves of your local retailer. Over the past 44 years, OMNI has developed deep expertise in leveraging the benefits and durability of urethane to help customers improve operations, reduce energy consumption, achieve increased operational throughput, and break into markets that were otherwise unavailable through conventional manufacturing materials or processes.



SWEETS & MEATS BBQ

Kristen Bailey, CEO/ Co-Founder
2249 Beechmont Ave UNIT B,
Cincinnati, OH 45230
513.888.4227
www.sweetsandmeatsbbq.com

Sweets & Meats BBQ launched as a roadside pit stop in 2014 and is celebrating 9 years in business this year. We are a full-service caterer and food truck specializing in smoked meats, homemade sides, and desserts, using family recipes. Collectively, our team has over 100 years of experience providing quality food and service for special events. We are available to cater with our food truck or offer buffet service 24x7x365. We believe in being good stewards of our community and donate 25% of annual profits to local organizations in the Cincinnati area with a focus on children and education. We are a second-chance employer. We have been recognized as Female Entrepreneur of the Year (Cincy Chic), Best Food Truck (Cincy Magazine), Top 10 Best BBQ (City Beat Cincinnati), and won 1st Place Best Dessert at the 2023 Taste of Cincinnati and 2nd & 3rd Place Best Entrée in 2022.



ROADiD

Edward Wimmer, CEO/ Co-Founder
814 Washington St, Covington, KY 41011
800.345.6336
www.roadid.com

ROADiD is a family-owned eCommerce company in Covington, KY. We exist to save lives, provide peace of mind, and fuel adventure by improving the outcome of accidents and emergencies. Our products are wearable ID and technology that connect our customers with their loved ones in emergencies. ROADiD has positively impacted almost 5 million lives, with the goal of impacting over 9 million by 2027. Founded by a father and son in 1999, ROADiD has an established reputation for quality products, blindingly awesome customer satisfaction, and being a great employer. We demonstrate this through ongoing initiatives (donating a percentage of every order to charity, sponsoring 4 Paws for Ability, planting trees to beautify Covington, and Great American Cleanup participation), regular social events (Beer Mile, gelato socials, Flying Axes, bingo, and weekly employee lunches), and unique benefits (employee purchase allowances, fitness membership reimbursements, and charitable donations to each employee's favorite charity).



WEALTHQUEST

WEALTHQUEST CORPORATION

Wade Daniel, CEO
50 E Business Way #120, Cincinnati,
OH 45241
513-530-9700
www.wqcorp.com

Wealthquest is a holistic wealth management firm — this includes preparing client income tax returns and performing year-round tax planning, managing their investment accounts, helping them establish and pay for their estate plan, and building a personalized financial plan with recommendations tailored to their unique circumstances. This integrated approach is coordinated all under one roof, by one team, for one simple fee. Since its founding in 2006, Wealthquest has been relentlessly pursuing its mission — 'empowering families to invest in their lives'. This mission initially impacted 132 client families with a combined \$64 Million of Assets Under Management (AUM). Seventeen years later, the firm serves over 1,500 clients across 44 states and manages more than \$1.6 Billion in AUM.



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JOIN US

**MONDAY, SEPTEMBER 11, 2023
HARD ROCK CASINO CINCINNATI**

**PURCHASE TICKETS ONLINE:
GOERING.UC.EDU/AWARDS**



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FOR A MONDAY NIGHT CELEBRATION
THAT SHOWCASES GREATER
CINCINNATI'S FAMILY AND PRIVATE
BUSINESSES.**

**THIS YEAR WE WELCOME SPECIAL GUEST
AND CO-EMCEE KENNY ANDERSON TO
KICK OFF THE CELEBRATION.**

