STEPHANIE ZENKER

Succession Dynamics Specialist for Family Enterprises

Member, Purposeful Planning Institute

SPEAKER BIO

Stephanie Zenker works with multi-generational family enterprises on the dynamics that determine whether a technically complete succession plan ever gets implemented.

Her background is in quality management. She spent years as a certified SQS auditor and EFQM Business Excellence coach, working inside a systems assessment framework built for finding where organizations break down and facilitating the people inside them through what needs to change. That discipline is how she reads family enterprise dynamics: structurally, not clinically.

A Master Certified Health Coach, she brings the other half of the work: the ability to sit with a founder who won't let go, or siblings who haven't been honest with each other in years, without pushing them through it and without turning it into therapy. When dynamics cross into clinical territory, she recognizes it and brings in the right professional.

Family enterprise succession is where those two disciplines meet. She works with founders, successors, and the advisory teams around them on the patterns that stall transitions: founder dependency, sibling relationships that fracture under real pressure, a next-generation leader the family says is ready but the founder won't release to.

A member of the Purposeful Planning Institute, Stephanie is based in Los Angeles and available for in-person and virtual speaking engagements.

THE RESEARCH CONTEXT

63% of family enterprise leaders say their next generation is not ready to lead. Only 29% named family dynamics as a succession challenge. But resistance to change (34%) and next-generation credibility concerns (33%) tell the rest of the story. The data confirms what estate planners already observe in practice: the plan is rarely the problem. The dynamics beneath it are.

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SESSION ABSTRACTS

The Layer Underneath the Plan: Why Technically Complete Successions Fail

30–45 MINUTE KEYNOTE OR BREAKOUT SESSION

Estate planners produce technically excellent succession documents. The trusts are structured. The ownership transfer is designed. The buy-sell agreements are in place. And then the family won't sign.

This session examines what is happening in the room when a succession plan is complete and the transition stalls. It addresses the specific patterns estate planners observe before a succession fails: the founder who agrees in every meeting and delays everything after it, the siblings who stop communicating, the successor who has been almost ready for three years.

Attendees will walk away with a sharper eye for the family dynamics patterns that precede a stalled succession, and language for raising it with clients without overstepping their professional scope. This session is not about therapy. It is about the structural layer of succession that legal and financial tools cannot reach.

The Conversation Nobody Wants to Start: Raising Family Dynamics Without Overstepping

30–45 MINUTE KEYNOTE OR BREAKOUT SESSION

Most estate planners can see it. The father and daughter on opposite sides of the conference table. Siblings who communicate only through counsel. The family meeting where everyone agrees and nothing moves. The patterns are visible. The question is what to do with them.

This session addresses the moment an estate planner recognizes family dynamics are affecting the plan and has to decide whether to say something. Attendees will walk away with a clearer sense of when family dynamics are worth naming, and how to raise them on solid professional ground. Becoming a family therapist is not the point. The point is recognizing when the plan is sound and the family is the variable.

The Missing Seat at the Table: Adding Family Dynamics to the Advisory Team

30–45 MINUTE KEYNOTE OR BREAKOUT SESSION

Every advisory team around a family enterprise succession has legal counsel, financial advisors, and often a business valuator. What most teams do not have is someone whose job is the family. When the founder's reluctance stalls the transaction, no one at the table is responsible for that.

This session examines what changes when a family dynamics specialist joins the advisory team. Attendees will walk away with a practical model for bringing family dynamics into an advisory engagement, and language that frames it as a strength of the team. The question is not whether families have dynamics that affect succession. It is whether the advisory team has anyone responsible for them.

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