

	2021						
	SEP	OCT	NOV	JAN	FEB	MAY	JUN
1 Business Family Dynamics Learn the concepts fundamental to understanding the business family and its unique challenges, especially during a leadership transition. Discover why building a good professional advising network allows for great advising.	21 - 22						
2 Family Enterprise Strategy Understand what it takes to create long term “family enterprising” that promotes transgenerational wealth. Learn how to blend family, business and ownership strategies.		26 - 27					
3 Business Boards and Family Councils Good governance is the foundation for good decision making. Come away with effective frameworks that facilitate successful decisions for business families.			23 - 24				
4 Multi-Disciplinary Advising Understand the intricacies of advising family-owned businesses, integrate tools for analyzing family dynamics, and discover how your role as an advisor fits within the family enterprise system. Leverage a multi-disciplinary approach and learn how to avoid giving advice that conflicts with advisors in other fields.				18- 20			
5 Facilitation and Communication Skills Learn the essentials needed to manage the complexities of business relationships including how to handle conflict, ask the right questions, and diffuse tense situations. Understand how the practical facilitation practices of emotional intelligence, group dynamics, authority, and leadership improve family communication.					18 - 19		
6 Continuity Planning Go beyond the technical legal, tax, and estate planning issues traditionally associated with succession planning. Instead, explore the “human” side of the succession process that must be considered in transitioning the family, the business and the ownership successfully.						13 - 14	
7 Knowledge Integration and Application Bring the program teachings alive by bringing together your far-reaching knowledge in a dynamic dialogue and partnership with other participants. Utilize case studies and presentations to apply your knowledge, which culminates in a final team project and presentation to your peers.							7 - 8

What is the value of a FEA?

“The FEA Program is primarily geared towards the education of advisors from various disciplines, and I found the interpersonal interaction in class as valuable as the formal instruction. As a family member, being able to converse in a respectful environment where confidentiality was respected, with lawyers, accountants, therapists, wealth managers and insurance advisors proved to be an enriching learning experience.”

Travis Klassen FEA | CEO Klassen Business Group

“Families are complicated. Successful businesses have complex technical requirements. Multijurisdictional, multi-generational, enterprising families need help structuring their unique process for continuity. The FEA Program focus helps inter-disciplinary professionals to combine their expertise and deliver successful integrated decision making within the family, the business, and the ownership circles. The FEA Program is an excellent educational segment to round out technical expertise and provide a diverse lens that is necessary in solving our client's complex continuity plans.”

Susan St. Amand CFP, CLU, CH.F.C., TEP, FEA, ICD.D | Sirius Financial Services

Earn the FEA Designation

Families are becoming more discerning about the advisors they bring into their fold. The FEA Designation helps family business owners immediately identify trustworthy advising professionals who can understand and navigate their unique challenges. By earning the FEA Designation, advisors will earn the designation that is quickly becoming the standard in Canada that identifies family enterprise advisory specialists.

Learn from the experts

This program is an opportunity for advisors to learn from renowned leaders in their fields, combining decades of family enterprise and family advising experience with the academic acumen to provide an unparalleled educational experience.

“There is a great deal of distraction in family businesses, deriving from personalities, ownership issues, family involvement/interference and communication issues, both within the business structure and at outside family gatherings. The FEA Program provided excellent support and training that has helped me to understand and navigate these complexities.”

Nora Jones CA, CPA, CFA, MBA, TEP, CFP, FEA | RBC Wealth Management

IIROC/CECAP/FP Canada Accredited

Select modules of the FEA program have been accredited for 13 hours of IIROC Professional Development CE. Select modules of the FEA program also qualify for 13 FP Canada-Approved CE credits. Advisors who enroll and successfully complete these modules may claim continuing education credits with either of these organizations for the current CE cycle.

Notes
