

REQUEST FOR ADVISORS AND SUBJECT MATTER EXPERTS SUPPORT CENTER FOR PERSONAL ADVISORY GROUPS (PAGs)

The Family Enterprise Xchange (FEX) requests proposals from trained speakers and subject matter experts to build our the Directory on our PAG Support Center in effort to support our Personal Advisory Groups (PAGs). PAGs meet the challenge of isolation in family businesses head on by providing an unparalleled opportunity to discuss succession, business management, strategy, and family issues with other members of family businesses. A Personal Advisory Group (PAG) is a group of 8 - 12 individuals, each from a family member company, who meet regularly to share personal and business ideas and help each other overcome problems.

The program also provides the group members with expert, objective, and intimate advice in an atmosphere of mutual trust and support. To ensure discussion in FEX PAGs continue to be relevant, topical and current, FEX is accepting proposals from **Subject Matter Experts** and **Trained Facilitators** who would like to put themselves forward on our Members Only Directory.

What Our PAG Members Want

Our members want thoughtful presentations and information presented by qualified subject matter experts who can provide thought leadership and relevance to the family business sector. They want opportunities to learn more about topics that are important to them and their businesses in a group environment to have thoughtful discussions.

Who We Are Looking for

We are building a bigger and more robust PAG Support Center for our Members and are seeking thought leaders and experts with a passion for the field of family enterprise who are experienced presenters and/or educators. We are building a directory filled with exceptional facilitators and subject matter experts that respect FEX values; a commitment to creating a safe harbour of learning and an environment of non-solicitation.

They are highly skilled in their specific profession and are interested in engaging with members who are in family enterprises.

Currently, we are looking for facilitators/subject matter experts who focus on three specific topics: **Legal**, **Continuity Planning** and **Sustainability**. We will continuously update our Support Center and will be asking our Community, through additional RFP's, for support throughout the year.

Submissions accepted until May 22, 2019, 5:00pm Eastern Time.



The Opportunity

This is an opportunity to engage our influential audience who represent the broader family enterprise community by sharing your experience, knowledge and expertise with a well-established PAG.

Specific topics: Legal OR Continuity Planning OR Sustainability

What we are looking for: Participate as a Presenter and/or Subject Matter Expert: As a subject matter expert, your information will be included in our Directory and available to PAGs looking for support. Work with a PAG to deliver informative content during their meeting(s) as requested. Please complete the below form and submit all necessary criteria to ldirenzo@family-enterprise-xchange.com.

1. Name and Contact Information:
2. Specific Topic: Legal OR Continuity Planning OR Sustainability
3. 5 key learnings that will be addressed in presentation:
4. Presentation length including time for Q & A:
5. Preferred location and willingness to travel:
6. Fee details: No fee? Fee for service? Fee for travel expenses? Other:
7. Example of a recent work (video, presentation, etc.): **please attach in email**
8. FEX provides a ‘safe harbour’ environment free of sponsorship and solicitation. Presenters need to comply with this policy. You are aware of this policy and will not solicit or sell to a PAG.
9. Brief speaker bio (max 50 words):

Questions?

Please identify what topic you are interested in and submit all necessary criteria. If you have additional questions, please contact Leah DiRenzo at ldirenzo@family-enterprise-xchange.com.

FEX will connect should we choose to feature your details in our Directory found on the PAG Support Center. You may also be asked to provide a reference before we share your details. Thank you for your submission.

