



2017 FAMILY ENTERPRISE XCHANGE SYMPOSIUM

XCHANGING GENERATIONAL WISDOM

June 12 – 14, 2017 | Halifax, Nova Scotia
Marriott Halifax Harbourfront Hotel & Conference Centre



WELCOME TO HALIFAX – AND THE 2017 FAMILY ENTERPRISE XCHANGE SYMPOSIUM

It is my great pleasure to welcome you to the inaugural Family Enterprise Xchange Symposium, and to beautiful Halifax, Nova Scotia.

The first annual FEX Symposium will provide a forum for enterprising families and advisors to “**Xchange Generational Wisdom**”. This year we have invited business families, thought-leaders, and educators from around the world to inspire and engage us with their knowledge, experiences, and ideas, as we come together to learn, laugh, and lead with compassion and intelligence.

We’ve packed the next three days with interactive workshops, educational seminars, rousing speeches, and the chance to meet and immerse yourself amongst other amazing people from around the country and around the world. We have all converged in Halifax, with diverse backgrounds, individual experiences, and unique professions – but we almost all certainly agree on a few things: we’re here because we believe in the power of family enterprise and the importance of building a strong community to empower enterprising families and their advisors with a unique blend of shared wisdom, knowledge, and support.

Dive into the plenary sessions, soak up the keynote addresses, roll up your sleeves at a workshop, and save some energy for a little mix and mingle at the FEYA Gala Dinner and the not to be missed De Kuyper Royal Distillers cocktail reception. Enjoy and embrace this time spent amongst friends, family, and colleagues at what promises to be a most extraordinary event.

Have an amazing experience full of inspiration, growth, and fun!



Allen S. Taylor
Chair, Family Enterprise Xchange

GREETINGS FROM THE FAMILY ENTERPRISE XCHANGE

I am thrilled that you have chosen to be here with us in Halifax at our first annual Family Enterprise Xchange Symposium. Everyday you are presented with choices about how and where you spend your time; we feel privileged that you have decided to spend the next few days with us. In recognition of your commitment to be here we have developed an exceptional program which I am confident will deliver an experience that is world class and that will inspire you in your family enterprise journey.

I am also convinced that your experience here will inspire you to become even more committed and involved in the family enterprise movement. This movement continues to build strong momentum across Canada and globally as leaders in government and business recognize the key role and significant contribution that family enterprises play in our overall economic and social well being. At the Family Enterprise Xchange, we are focused on building out a robust ecosystem that will deliver a unique blend of knowledge, wisdom and shared experiences to business families and their advisors. A vital component of that ecosystem will be our comprehensive knowledge and learning continuum based on the world's best leading-edge thinking. This continuum will aid our members in building the capacity and skills needed to thrive and succeed. We are firmly committed to empowering the enterprising strength of Canadian business families and their advisors and invite you to join us on this journey.

Over the next three days I encourage you to fully immerse yourself in the various sessions and activities and get the most of our time together at the 2017 FEX Symposium in beautiful Halifax. I personally believe our program is fantastic and would like to express my appreciation and thanks to our Symposium Board Committee, led by Margaret-Jean Mannix, for volunteering their invaluable resources of time and expertise to organize this inaugural event.

I look forward to sharing this experience with you.



Bill Brushett, FCPA, FCA
President and CEO, Family Enterprise Xchange

XCHANGING IDEAS

Please share your wisdom and ideas at our 'Xchanging Ideas' wall across from the Nova Scotia Ballroom.

We've asked a series of questions that will hopefully inspire you to share your own experiences and thoughts, for the benefit of all of us. Just grab a post-it note and start sharing!



CHECK OUT OUR APP

To keep you connected before and during the conference, we have a "Yapp" that will keep you updated on the day's activities, allow you to connect with others, easily see agenda topics and speakers, participate in some polling – all by using your smartphone.

It's easy to use and takes just a few minutes to install:

1. On your smartphone, go to: <https://my.yapp.us/fex2017>
2. Download the Yapp app. For iPhone users, you may be prompted to enter your Apple ID.
3. Open the Yapp app and select "Download an Existing Yapp."
4. Tap the app to explore some useful information.

Note: Yapp works on iPhone and Android devices only. (Sorry, no Blackberry!)



FEX has engaged the services of a professional photographer to document the inaugural FEX Symposium. General session and workshop photos will be taken, and may be posted on the FEX website.

MONDAY, JUNE 12

8:30 am – 11:30 am

Pre-Symposium Workshop | Path to Excellence

FEA Designates Only

Judi Cunningham and Gaia Marchisio

Halifax A

1:00 pm – 2:45 pm

Welcome from the Chair, Family Enterprise Xchange

Allen S. Taylor

How to Identify and Set-Up an Intraprise Within Your Family Business

Guillaume Hervé

Nova Scotia Ballroom

Break

3:00 pm – 4:30 pm

Driving RESULTS: Unleash Your Talents StrengthsFinder Workshop

Carla Wood

Nova Scotia Ballroom

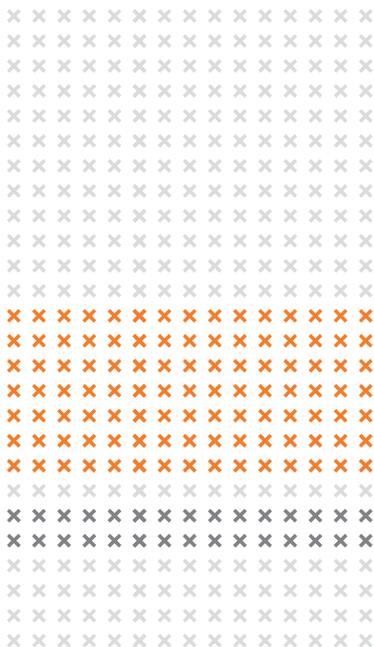
5:30 pm – 9:30 pm

FEYA GALA

Canadian Museum of Immigration at Pier 21

(Coaches will depart from the Marriott's main entrance at 5:30pm)

PROGRAM OVERVIEW



TUESDAY, JUNE 13

7:00 am – 8:30 am

Networking Breakfast

Nova Scotia Ballroom

8:30 am – 9:30 am

Graceful Generational Transitions

Diana Chambers

Nova Scotia Ballroom

Break - and move to workshop rooms

9:45 am – 11:15 am

Concurrent Workshops

An Owner's Mindset: Building Capacity in the Rising Generation

Wendy Sage-Hayward

Acadia AB

Forgiveness - A Key Competency for the Successful Family Enterprise

Lloyd Robinson

Halifax A

Mistakes Made, Lessons Learned

Kathleen Wiseman

Halifax BC

Break - and move back to main ballroom

11:30 am – 12:15 pm

Diving into the Family Business

Paul Attia

Nova Scotia Ballroom

12:15 pm – 1:15 pm

Lunch

Nova Scotia Ballroom

“I’m looking forward to being on this journey with all of you. Please bring both your wisdom and curiosity!”

- David Bentall, Master of Ceremonies

1:15 pm – 2:45 pm

Concurrent Workshops

Belonging in a Family Enterprise

Families Only

Diana Chambers

Halifax A

**Green, Yellow, or Red Zone Families:
Which Do You Have in Your Advisory Practice?**

Advisors Only

Jim Grubman

Halifax BC

Family Systems and Communication Patterns

Alberta Business Family Institute | Shauna Feth and Val Monk

Acadia AB

Break - and move back to main ballroom

3:00 pm – 4:30 pm

De Kuyper Royal Distillers: The Tale of the Cocktail

Vanessa Strike and the De Kuyper family

Nova Scotia Ballroom

4:30 pm – 5:30 pm

Cocktail Reception

Ballroom Foyer

Evening

Free to explore Halifax on the Good Cheer Trail

7:00 am – 8:30 am

Networking Breakfast

Nova Scotia Ballroom

8:30 am – 9:30 am

**Becoming a “Learning Family Enterprise” -
A Key Element in Your Family’s Success**

Jim Grubman

Nova Scotia Ballroom

Break - and move to workshop rooms

9:45 am – 11:15 am

Concurrent Workshops

**Forgiveness - A Key Competency for the
Successful Family Enterprise**

Lloyd Robinson

Halifax A

Are You “Wealthy”?

Families Only

Patricia Angus

Acadia AB

Mistakes Made, Lessons Learned

Kathleen Wiseman

Halifax BC

Break - and move back to main ballroom

11:30 am – 12:30 pm

Multi-Generation Family Enterprise Panel

Diane Côté and Jean-Philippe Gagnon

Moderator: Margaret-Jean Mannix

Nova Scotia Ballroom

12:30 pm – 1:30 pm

Lunch

Nova Scotia Ballroom

1:30 pm - 1:40 pm

**Message from the President & CEO,
Family Enterprise Xchange**

Bill Brushett

1:40 pm – 2:45 pm

Integrating My Learning into MY World

Carla Wood and David Bentall

Nova Scotia Ballroom

2:45 pm – 3:00 pm

Closing Remarks

PROGRAM DESCRIPTIONS

MONDAY

Path to Excellence | **Judi Cunningham and Gaia Marchisio**

Pre-Symposium Workshop - FEA Designates Only

mas·ter·y

noun: mastery; comprehensive knowledge or skill in a subject or accomplishment.

Mastery is the fourth level of accomplishment on the FEX Learning Continuum, and the FEA Program and Designation have laid the foundation on this path towards excellence. But what does it mean to be a master? What do we need to learn and how will we know when we get there?

One of the biggest challenges in the pursuit of mastery in any field of study or physical pursuit is learning how to manage ourselves - our emotions, our biases, and recognizing that our perceptions and assumptions are coloured by our own story and life experiences. How do we learn to get out of our own way?

This unique workshop will ask you to reflect on what you have learned and how you have applied that learning. We will explore the areas in your practice that you find the most challenging and the opportunities you are afraid to take because the outcome is uncertain or unclear. Next, through family vignettes, you will be challenged to assess, decide and articulate a process to address each family enterprise situation. Think of this as FEA in the ER.

How to Identify and Set-Up an Intraprise Within Your Family Business | **Guillaume Hervé**

Intrapreneurship is becoming increasingly relevant to businesses looking to compete with the allure and excitement of entrepreneurship and independent start-ups. Guillaume will speak about intrapreneurship and its place and importance to businesses looking to grow and diversify. He will discuss how new intrapreneurial business ideas can be identified, and speak to the main challenges of intrapreneurship and the benefits of leveraging this approach to incubate new business initiatives and identify future leaders. He will also address how intrapreneurship can play a key role in ensuring the continuity of the family enterprise.



Driving RESULTS: Unleash Your Talents - StrengthsFinder Workshop | **Carla Wood**

Family Enterprise can be the greatest opportunity in the world and one of the most challenging. Understanding the 'why' behind many of the behaviours, perspectives, miscommunications, strengths and differences in each member of your family or team can bring about immense change in the family dynamics, communication, productivity and success of your business.

Using your StrengthsFinder assessment as a foundation, get ready for some big "aha" moments and clarity on how to make some small tweaks with big impact.

FEYA Gala | **Canadian Museum of Immigration at Pier 21**

The Family Enterprise of the Year Award (FEYA) is an annual recognition by FEX to celebrate and promote the achievements of Canadian business families and the considerable contribution they make to both their local communities and our national economy. Each year the national finalists and recipient are honoured at a gala dinner, which this year will take place at the Canadian Museum of Immigration at Pier 21.



Canadian Museum of Immigration at Pier 21
Musée canadien de l'immigration du Quai 21



TUESDAY

Graceful Generational Transitions | Diana Chambers

Whilst a family's senior generation may recognize that they need the next generation to continue their legacy, they may hesitate to cede control. Mixed emotions can collide with a next generation's expectations and desires. The stakes couldn't be higher when the family's assets and relationships are on the line.

Diana Chambers will help us to identify some of the drivers at play, so we have a clearer idea how to engage in ways that will be a win-win for both generations. We'll see how our relationship to money can either help or hinder the dynamics and generational succession. The path forward includes developing financial emotional intelligence (EQ) in all our family members. This skill can help us address challenges not only between generations but also among siblings and cousins.

An Owner's Mindset: Building Capacity in the Rising Generation | Wendy Sage-Hayward

The family enterprise world is hugely complex with its ever-changing landscape of the family, business and ownership lifecycles. So how do business families develop thoughtful, capable next-generation owners to manage this complexity? It happens by investing in and nurturing an owner's mindset along with a genuine sense of stewardship. This workshop offers a structure and approach for each stage of an owner's development across the lifespan (from earliest years to retirement), providing examples and practical advice for the promotion of strong personal, interpersonal, family, and business knowledge and capabilities. We will explore how to grow the skills, knowledge, and abilities required to be an effective family business owner at any age or development stage.

Forgiveness - A Key Competency for the Successful Family Enterprise | Lloyd Robinson

In this workshop, attendees will be exposed to the key elements of Forgiveness and why it can have a significant impact on the success of the family and the family enterprise. The program will include practical information on why Forgiveness is a key competency for all family members to develop and practice. Attendees will be given a roadmap focusing on Forgiveness as a life skill everyone can learn and apply in resolving conflicts, building trust, and working cohesively over the long term.

Mistakes Made, Lessons Learned | Kathleen Wiseman

Edison tried 1,800 times to make the light bulb. Columbus was headed to India for spice. And Marie Curie's failures gave us radium. Mistakes: we all make them. It's just part of being human. What counts is what we do with the experience; how we learn from those mistakes. The session will highlight the mistakes made and possible alternatives to living and working in family enterprise as a family member or as a professional advisor.

Diving into the Family Business | Paul Attia

In the midst of a successful legal career as a criminal prosecutor, Paul made a major decision to walk away from it all and dive headfirst into the world of family enterprise. When he began working in the family business, Attia Quarries, founded by his immigrant father, the transition from trial lawyer to family business owner was not an easy one.

Belonging in a Family Enterprise | Diana Chambers

Families Only

An opportunity to continue a dialogue with Diana Chambers. Diana will facilitate a peer-to-peer conversation on identity within a legacy family while recognizing the inherent tension for next generation family members who want both to be true to themselves and belong to the larger family. Together you will consider how the senior generation might encourage all family members to pursue their unique paths while still contributing to the larger family enterprise.

Green, Yellow, or Red Zone Families: Which Do You Have in Your Advisory Practice? | Jim Grubman

Advisors Only

Families of wealth and family enterprises have some things in common and many things that are individual. A crucial advisory skill is to know how to strike the right balance of generalizing and tailoring the process for each client family. The workshop will look at key attributes advisors need to attend to, including the family's generation of wealth, cultural heritage, pattern of communication, and methods of decision-making. We will also look at how advisors' own biases can interfere with accurate assessment and successful collaboration with the family itself.

PROGRAM DESCRIPTIONS

TUESDAY CONTINUED

Family Systems and Communication Patterns | Alberta Business Family Institute, Shauna Feth and Val Monk

We all know that the first place we learn how to communicate is within our family, yet we are generally unaware of how much impact those powerful learnings have in our day to day conversations.

Every family creates its own culture of communication, and most often, the family business will adopt the culture and values of the family. This includes the communication habits, patterns and expectations that have grown from family relationships and interaction. This workshop will provide advisors and family members alike an opportunity to become more aware of the patterns of communication that can support or limit success. Effective communication processes can simultaneously improve family relationships leading to successful business practices and a clear ownership vision. This workshop is based on the teachings of Virginia Satir, known worldwide for her work related to family systems and communication.

“We can learn something new anytime we believe we can.”
- Virginia Satir

De Kuyper Royal Distillers: The Tale of the Cocktail | Vanessa Strike

An interactive-audience facilitation of the case story of De Kuyper Royal Distillers, followed by a discussion with Bob de Kuyper, Marc de Kuyper and spouse Viviane de Kuyper, and ending with an audience Q&A. De Kuyper Royal Distillers is a 322 year-old family firm in the Netherlands and produces the largest variety of liqueurs in the world. The firm has always been owned and controlled by the De Kuyper family. Join us for cocktails after the session, supplied by De Kuyper Royal Distillers.

EVENING SOCIAL THE GOOD CHEER TRAIL

The Good Cheer Trail is Canada’s first winery, craft brewery and distillery trail. Named after Samuel de Champlain’s Order of Good Cheer, over 35 participants are set to help you to discover your own unique beverage experience.

The trail features more than 60 experiences from one end of the province to the other. The Good Cheer Trail passport is your tool for mapping your self-guided tour in search of local craft beer, wine, cider and distillery experiences.

Pick up your Good Cheer Trail Passport at the registration desk and take advantage of an evening at leisure with friends and colleagues. Get a group together and make a plan to visit local craft breweries and pubs, have your passport stamped and meet us back at Murphy’s on the Cable Wharf for a drink after dinner.

Don’t forget to bring your passport with at least 2 stamps for a raffle ticket to win a Taste of Nova Scotia Ultimate Gourmet Sampler gift basket. The basket will be shipped directly to the winner’s home.

Visit Places like:

- Gahan House Harbourfront
- Garrison Brewing Co.
- Good Robot Brewing Company
- Halifax Distilling Co.

And many more!



WEDNESDAY

Becoming a “Learning Family Enterprise” - A Key Element in Your Family’s Success | **Jim Grubman**

One of the most important qualities of successful multi-generational families is a mindset of shared learning. Yet for many families in the first or second generation of wealth, this is difficult. Entrepreneurs may not be good teachers, or they may take the approach that, “No one taught me, why should I have to teach them?” The Rising Generation may be more focused on establishing their credibility than revealing their gaps in skill or knowledge. In this keynote, Jim Grubman will discuss the latest research on the importance of being a learning family enterprise and how the generations can work together to foster a dynamic, adaptive culture.

Forgiveness - A Key Competency for the Successful Family Enterprise | **Lloyd Robinson**

In this workshop, attendees will be exposed to the key elements of Forgiveness and why it can have a significant impact on the success of the family and the family enterprise. The program will include practical information on why Forgiveness is a key competency for all family members to develop and practice. Attendees will be given a roadmap focusing on Forgiveness as a life skill everyone can learn and apply in resolving conflicts, building trust, and working cohesively over the long term.



Are You “Wealthy”? | **Patricia Angus**

Families Only

This session will provide an opportunity to explore “wealth” in historic and cultural context so that participants can learn from Western and Eastern wisdom and apply it to their families in practical ways. It will create a safe space to step back from day-to-day concerns about business, tax, finances, and investments, and allow personal reflection on realistic ways to face even more complicated challenges. The conversation will centre on what does “wealth” mean to you and your family, and how can you attain it? By focusing on essential and timeless questions, family members will explore what they don’t know, consider how to be more comfortable with uncertainty, and most importantly, develop follow up steps for practical application. There is comfort to be gained from the wisdom of the ages, and this session will help family members of all generations feel more comfortable with issues of greatest concern. Each participant will be encouraged to develop their own practical ways to apply the learnings of the session. It is a unique chance to shift perspective and gain new insights.

Patricia Angus will lead the group through an interactive discussion focused on helping participants better understand what they do - and don’t - know, and how to help their families and family enterprises long into the future.

Mistakes Made, Lessons Learned | **Kathleen Wiseman**

Edison tried 1,800 times to make the light bulb. Columbus was headed to India for spice. And Marie Curie’s failures gave us radium. Mistakes: we all make them. It’s just part of being human. What counts is what we do with the experience; how we learn from those mistakes. That makes all the difference! With that in mind, the session will highlight the mistakes made and possible alternatives to living and working in family enterprise as a family member or as a professional advisor.



PROGRAM DESCRIPTIONS

WEDNESDAY CONTINUED

Multi-Generation Family Enterprise Panel | **Moderator:** **Margaret-Jean Mannix**

All family enterprises face the challenge of engaging and inspiring the upcoming generations who want to contribute to the family's operations. It takes commitment to the continuity of the family enterprise to create opportunities for next gen members. Supporting their education and professional development as well as their individual interests is a good starting point. However, because of a variety of reasons, sometimes the next generation is not able to see an exciting and inspiring path for themselves within the family enterprise. Join us as we learn from both a senior and a rising family member about ways to create dialogue and for the exchange of wisdom that honours the needs and aspirations of all generations.

Panelists:

Diane Côté, CEO, MEDTEQ Industrial Research and Innovation Consortium

Jean-Philippe Gagnon, Consultant, Communications and Development, Innovitech

Integrating My Learning Into MY World | **Carla Wood and David Bentall**

In this concluding session, you will have the opportunity to discuss, debrief and develop an action plan based on what you learned and who inspired you, from the many topics our speakers and presenters offered throughout the symposium. Connect with colleagues and family members, listen for insights and share your discoveries while considering what steps you want to take to implement your learning into your business, practice and relationships. You will leave with concrete takeaways from the session speakers that you can apply to an action plan.

Get ready to make some exciting commitments to your business, your practice and your life with the support of Speaker and Strategist Carla Wood and Family Enterprise Advisor and Coach, David Bentall.

We want you back at our 2018 Symposium saying, **“Guess what we achieved since last year!”**



PRESENTERS

Patricia Angus, JD, MIA, TEP | Are You “Wealthy”?

For more than a quarter century Patricia Angus has helped families around the world with some of their most vexing problems as a lawyer, wealth advisor, and independent family enterprise consultant. She is a founding Director of the Family Business Program at the Columbia University Graduate School of Business, where she is an Adjunct Professor.

Paul Attia, LLB | Diving into the Family Business

Paul Attia is a speaker, criminal prosecutor, family business owner and a husband and father of four. In his work as a prosecutor, Paul has advocated before judges and juries as lead counsel on trials involving some of the most serious offenses in Canada. He has also testified before Parliament, lectured in law schools, and been an active member of boards. Yet, in the midst of a successful legal career, Paul made a major decision to walk away from it all and dive headfirst into the world of family enterprise and his family business, Attia Quarries, a group of landscaping stone quarries located north of Toronto that was founded by his immigrant father. The transition from trial lawyer to family business was not an easy one.

David Bentall | Program Facilitator and Master of Ceremonies

David is an Adjunct Professor at the Sauder School of Business with expertise in the areas of succession consulting and executive and life coaching. He is a seasoned executive and educator who brings a wealth of knowledge and first-hand experiences to family business issues. For twenty years, David worked in his family's real estate and construction businesses as President and CEO of Dominion Construction.

Diana Chambers | Graceful Generational Transitions and Belonging in a Family Enterprise

A third-generation member of a UK business family, Diana Chambers is a family wealth mentor and philanthropic advisor specializing in helping her clients build their financial emotional intelligence (EQ) to enhance their wealth experience. She lived in the US for twenty-seven years and now serves her global clientele from Switzerland. She recently published *True Wealth: Letters on Money, Life, and Love* to address the challenges most frequently voiced by her clients.

Diane Côté | Multi-Generation Family Enterprise Panel

Diane Côté is CEO of MEDTEQ, the Quebec Medical Technology Industrial Research and Innovation Consortium. She is a member of the Board of Directors of the Fonds de recherche du Québec – Santé (FRQ-S), CIMTEC, the Centre for Imaging Technology Commercialization, and AlterGo, supporting social inclusion of people with functional disabilities, and a member of the Life Sciences Advisory Group of Global Affairs Canada.

Judi Cunningham, MA, FEA | Path to Excellence

Judi is an expert in the field of family enterprise advising. She illuminates the significant role of families in business - highlighting their economic, community, and philanthropic contributions. Judi has been instrumental in developing world class programming for business families, and designed and developed the curriculum for the Family Enterprise Advisor Program. Judi co-founded the Business Families Centre at the Sauder School of Business at the University of British Columbia, and founded the Institute of Family Enterprise Advisors. Her passion for education and assistance for business families led to the only designation in the world for advisors to family enterprise.

Shauna Feth, FEA | Family Systems and Communication Patterns

Shauna is the Executive Director of the University of Alberta School of Business, Alberta Business Family Institute and former Project Manager for the Creating Pathways for Entrepreneurial Families Rural Initiative. Shauna is a certified Family Enterprise Advisor and has helped many small to medium sized businesses successfully transition to the next phase of ownership. As a third generation family business member and partner in her own family business, Shauna understands the need to readily access further education, information and resources in order for both the family and the business to thrive.

Jean-Philippe Gagnon | Multi-Generation Family Enterprise Panel

Jean-Philippe Gagnon joined the family business, Innovitech, in 2012 after graduating from the entrepreneurship program at HEC Montreal. As Consultant, Communications and Development, he collaborates on the promotion of the firm's mandates as well as the development of key projects such as innovation districts in Montreal, research consortiums and creative startups.

PRESENTERS

Jim Grubman, Ph.D | Green, Yellow, or Red Zone Families: Which Do You Have in Your Advisory Practice? and

Becoming a “Learning Family Enterprise” - A Key Element in Your Family’s Success

Dr. Jim Grubman is a senior advisor and partner at Cambridge Advisors to Family Enterprise, a highly specialized international advisory firm serving family enterprises. Dr. Grubman has provided services to individuals, couples, and families for nearly 40 years. In addition to his work with client families, Dr. Grubman has collaborated or consulted with single and multi-family offices, institutional financial firms, and independent wealth management advisory firms. Dr. Grubman is a lecturer and facilitator in Harvard Business School’s “Families in Business: From Generation to Generation” program. Dr. Grubman is the author of *Strangers in Paradise: How Families Adapt to Wealth Across Generations*, a ground-breaking explanation of how individuals and families can adjust to wealth effectively over time. He is also the co-author of *Cross Cultures: How Global Families Negotiate Change Across Generations* with colleague Dennis Jaffe, Ph.D.

Guillaume Hervé, BEng, MSc | How to Identify and Set-Up an Intraprise Within Your Family Business

Guillaume Hervé is an accomplished senior business executive and serial intrapreneur with more than 25 years of experience in leadership and management spanning several sectors, including aerospace, high technology, healthcare, government and defence. He is the author of *Winning at Intrapreneurship: 12 Labors to Overcome Corporate Culture and Achieve Startup Success* and the Intrapreneurship Expert in Residence at the Business Families Foundation, Chairman of CTS Health, an accelerator for medical technologies companies, and an executive mentor to entrepreneurs in Montreal.



Gaia Marchisio, Ph.D | Path to Excellence

Gaia Marchisio is the Executive Director of the Cox Family Enterprise Centre at the Kennesaw State University and the Aronoff Professor of Family Business. As a tenured Associate Professor, Gaia developed several curricula for family business classes, and teaches undergraduate and MBA courses on family business, management and behavioural sciences, and consulting services. She has been a visiting faculty under numerous Family Business Centres in Latin America, Asia, Europe, and New Zealand. Gaia was raised as a 4th generation successor in her family’s business. This experience helped her understand the emotional challenges and responsibilities of being a young member of an entrepreneurial family.

Margaret-Jean Mannix, ICD.D, FEA | Multi-Generation Family Enterprise Panel

Margaret-Jean is currently Chairman of a Private Family Office and family foundation. Her responsibilities include overseeing the Family Council. Since 1995 Margaret-Jean has held positions of increasing responsibility in her own family’s business which taps into her keen understanding of international business practices in Canada, Great Britain and China. Prior to joining her family business Margaret-Jean lived and worked in England where she held a management position at Global Private Banking, The Royal Bank of Canada. Margaret-Jean is a graduate of Loyola University’s Next Generation Leadership Institute and sits on the Boards of Business Families Foundation (BFF), Family Enterprise Xchange (FEX) and Mancal Corporation.

Val Monk, Ph.D | Family Systems and Communication Patterns

Val is a family business advisor at Val Monk and Associates and has worked in the field of human dynamics and family business systems for over 35 years. As someone who grew up in a family business, she has firsthand appreciation of the incredible energy and commitment that goes into a family business, succession planning and leadership development. Val has offered her professional expertise as a family business advisor, leadership coach, mediator and communication facilitator to businesses, organizations, families and individuals throughout Canada, United States and Mexico. She is an advisor and facilitator with the Alberta Business Family Institute and has designed and delivered programs for Business Families Foundation.

Lloyd Robinson | Forgiveness - A Key Competency for the Successful Family Enterprise

Lloyd Robinson is an accomplished executive with a law degree and an extensive background in business development. He presently mediates disputes and coaches leaders in personal and organizational development. In his coaching and conflict resolution work, Lloyd found that many individuals were consumed with anger and resentment from past and current issues. They were unable to work productively in their business and/or personal pursuits, and were unable to let go of the personal hurt they had experienced.

Wendy Sage-Hayward, MA, FEA | An Owner's Mindset: Building Capacity in the Rising Generation

Wendy is a consultant at the Family Business Consulting Group. She has 25+ years of experience working with business leaders, family firms, and boards. She serves a global and diverse set of clients across the industry, facilitating meaningful conversations with multi-generational families on matters relating to firm continuity, next generation preparation, governance and, when needed, conflict resolution. Wendy has a Masters Degree in Family Systems Counseling Psychology from the University of British Columbia and an Executive Masters Degree in the Neuroscience of Leadership from the Neuroleadership Institute. She is an Adjunct Professor at the University of British Columbia's Sauder School of Business.

Vanessa Strike, Ph.D | De Kuyper Royal Distillers: The Tale of the Cocktail

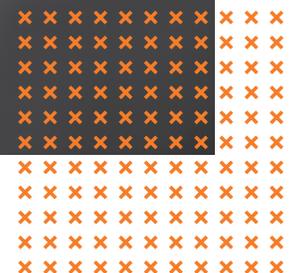
Dr. Vanessa Strike is the CIBC Professor in Applied Business Family Studies at the UBC Sauder School of Business and is the academic lead at the Business Families Centre. Dr. Strike's primary research interests are in the areas of family business. In particular, she focuses on the challenges of governance and decision-making within the family firm, advising to the family firm, work-life balance, and the concept of sense-making. Dr. Strike's research in family business has received awards and been recognized both in Europe and North America. She received the award for the Academy of Management best family business paper, Academy of Management best social issues paper and the International Family Enterprise Research Academy (IFERA) Award for best research paper at the European Institute for Advanced Studies in Management Family Business Conference.

Kathleen Wiseman, MBA | Mistakes Made, Lessons Learned

Kathy Wiseman is adjunct faculty at the George Washington University School of Business, heading the Family Office Forum. She is the founder and president of Working Systems, Inc., and a founding member and past president of the Family Firm Institute. Kathleen is a co-founder of Navigating Systems - a course for lawyers, accountants, trust officers, and family office executives who want to learn more about family and how families function predictably.

Carla Wood, MBA, MSRE | Driving RESULTS: Unleash Your Talents and Integrating My Learning into MY World

A recognized voice in business strategy and relational leadership, and founder of ALL Strategy, a successful, international enterprise focused on driving growth for service-based businesses, Carla believes incremental shifts maximize results. Carla has a relational, intuitive, and grounded approach to metrics-based success influenced by her Psychology degree, MBA, and Masters of Science in Real Estate. Passionate about generosity, she serves as Chair on the Board of Dress for Success Vancouver, Secretary on the Board of World Relief Canada, and is a respected mentor through the Forum for Women Entrepreneurs.





FAMILY ENTERPRISE XCHANGE FOUNDATION

The Family Enterprise Xchange Foundation is generating sustainable funding to enable and integrate global best practices for families and their advisors. The Foundation funds leading-edge research, program development and builds awareness of the importance of family enterprise for our economy, and for Canadians.

By becoming a contributor to the Family Enterprise Xchange Foundation, you'll be helping to shape Canada's economy by bringing the world's best thinking and shared wisdom to the business families on which our future depends. The Family Enterprise Xchange Foundation is a registered charity and all donors are recognized on our website and receive a tax receipt for the full gift amount.

Please contact us to find out how you can take a leading role in establishing the movement that empowers the enterprising strength of families in Canada.

MESSAGE FROM THE CHAIR, FEX FOUNDATION

The Family Enterprise Xchange Foundation is here to help deliver and fund FEX activities and to bring a voice to this important national movement. We have ambitious objectives to grow the number of families and number of advisors who are part of FEX in the coming years. That's why we are making this important investment in time and resources - to create a commotion, to stand apart, and to take a quantum leap forward.

Our role is to be a strong advocate for political and economic change in this country based on where we are today and where we can go in the future. We will also curate and fund scientific research for families and their advisors, and we have embarked on two initiatives with the Conference Board of Canada: a two-year study on evaluating family enterprise in Canada and its impact, and the creation of a Centre for Family Owned Enterprises in Canada.

FEX was created to help families fulfill their greatest dreams, hopes and aspirations for their family and their family business. The Foundation is here to help make that happen, and we believe that this inaugural Symposium – Xchanging Generational Wisdom – is a wonderful step on the journey towards changing outcomes for all Canadians who are touched by family enterprise.

A handwritten signature in black ink, appearing to read 'James A. Burton', with a long horizontal stroke extending to the right.

James A. Burton, ICD.D
Chair, Family Enterprise Xchange Foundation

BECOME A MEMBER... LEAD A MOVEMENT

FEX provides enterprising families and their advisors with a world class Family Enterprise Learning Continuum, best in class peer advisory forums, leading-edge research, and global best practices, all delivered in a 'safe harbour' community free of sponsorship and solicitation.

We enable families and advisors to start new conversations that facilitate inter-generational harmony, continuity, and ongoing wealth creation that ultimately benefits the social and economic fabric of Canada. Our Founding, Legacy, and Charter Members are critical to our success in helping to shape Canada's economy and social wellbeing by bringing the world's best thinking and shared wisdom to the business families on which our future depends.

All Founding, Legacy, and Charter Members are recognized and celebrated as unique contributors to the family enterprise community, through annual commitments for five years.

Full details about member benefits can be found at:
www.family-enterprise-xchange.com/about/support-fex

For more information or to become a Founding, Legacy, or Charter Member, please contact Lorraine Bauer, Director of Membership:

T: 1.866.849.0099 ext. 224 | E: lbauer@family-enterprise-xchange.com



fea program + designation

Congratulations to our 2017 FEA Designates!

Only an FEA designation prepares advisors to be fluent in the complexities and nuances of serving Canada's business families. Congratulations to this year's FEA designates who have taken their advising expertise to a whole new level.

Andrea Volk
Scotia Wealth Management

Bill Fowlis
Miller Thomson LLP

Boyd Hamblin
BMO Private Banking

Caroline Dabu
BMO Nesbitt Burns

Christie Henderson
Henderson Partners LLP

Darrell Wade
Park Place Financial

David Emond
Cidel Trust Company

Don Smith
DSI Estate Planning Inc.

Enette Pauzé
Level 8 Leadership Institute

Eric Hohauser
Harvey Hohauser & Associates

Garreth Fallis
Richardson GMP

Gerry Meyer
LEC HR Advisory

Harry Vouitsis
Scotia Wealth Management

Holly Simmons
Golden Lasso

Jeff Kelly
Kelly Nutritious Pet Foods Inc.

John Fuller
Felesky Flynn LLP

Kate Pal
Pal Insurance

Kris Matthews
Matthews Group LLP

Kurt Mull
CIBC Wood Gundy

Leigh Vyn
BMO Wealth Management

Margaret-Jean Mannix
Loram 99 Corporation

Marguerite Ginn
Loram 99 Corporation

Mark Starratt
Richardson GMP

Michael Kirkpatrick
RBC Dominion Securities

Michael Oseen
Grant Thornton LLP

Paul Wheaton
Mawer Investment Management

Robert Cole
CIBC Wood Gundy

Sabrina Fitzgerald
PricewaterhouseCoopers LLP

Shabir Ladha
KBH Chartered Accountants

Shayne Stephens
Landmark Advantage

Stefan Erasmus
Werklund Capital Corporation

Susan Brown
Propel Insurance & Advisory Inc.

Susan Latremaille
Richardson GMP

Sylvia Azoulay
Richardson GMP

Todd Hohauser
Harvey Hohauser & Associates

Todd Worsley
Argos Capital Corporation

Vera Kurkdjian
RBC Wealth Management – Private Banking



The FEA program is brought to you by the Family Enterprise Xchange, a national organization that supports and educates enterprising families and their advisors through transitional issues, diversification and all aspects of their personal and business journey to success. For more information please visit Family-Enterprise-Xchange.com

2018 FEA PROGRAM

Get on the inside of family business – like never before!

The Family Enterprise Advisor (FEA) Program along with the FEA Designation helps advisors including accountants, lawyers, bankers, insurance and wealth advisors and coaches augment their formidable technical skills while showcasing their commitment to family enterprises and their ability to bring timely and thoughtful solutions to the family table.

Our designates report that the FEA Program has led to deeper relationships with their family enterprise clients and a broadened perspective of the issues business families face – including generational transition.

Family Enterprise Advisor Program 2018

Vancouver | Toronto | Calgary

For more information contact:

Peter Cotterill

T: 604.822.2790 | E: pcotterill@family-enterprise-xchange.com



FEA Business Family Dynamics – Halifax Nov. 2 and 3, 2017

The Family Enterprise Xchange in partnership with Dalhousie University, Centre for Family Business and Regional Prosperity, will be offering Business Family Dynamics which is the first module from the FEA Program.

In this two day program, you will learn the concepts that are fundamental to understanding the Family Enterprise and its unique challenges especially during a leadership transition. Understand Family Enterprise as an interactive system between the family, business, and ownership systems.

This program is suitable for advisors and business family members.

For more information contact:

Peter Cotterill

T: 604.822.2790 | E: pcotterill@family-enterprise-xchange.com



**DALHOUSIE
UNIVERSITY**

Centre for
Family Business and
Regional Prosperity

Leslie McNabb

T: 902.494.3222 | E: leslie.mcnabb@dal.ca

SESSION WORKBOOK

How to Identify and Set-Up an Intraprise Within Your Family Business | **Guillaume Hervé**

Session Objectives:

- Understand the key concepts of intrapreneurship
- Discover ways to identify intrapreneurship business ideas and the challenges that come with the territory
- How intrapreneurship can play a key role in a family business

Driving RESULTS: Unleash Your Talents | **Carla Wood**

Session Objectives:

- Learn how to leverage your natural talents and those of your family or team to do more, have greater enjoyment, and increase your profitability along the way
- Understand how to better work together around a common purpose
- Leverage communication, collaboration, connectedness and celebration using your learnings from the StrengthsFinder results



Insight

What were your key insights from the speaker? What really resonated with you that you would love to see happen in your world?



Insight



Takeaway

What ONE takeaway from this session would you like to implement? What would be the first step to make his happen in your world?



Takeaway



Action

What would be the benefit for your family, business or advisor practice? Why should your people embrace it?



Action

Graceful Generational Transitions | Diana Chambers

Session Objectives:

- Raise awareness of the importance and role of financial EQ
- Highlight some generational challenges, specifically identity formation of next generation and the tension they experience between belonging to family while pursuing their own unique paths
- Offer insights into some basic financial EQ skills



Insight



Takeaway



Action

An Owner's Mindset: Building Capacity in the Rising Generation | Wendy Sage-Hayward

Session Objectives:

- Raise awareness of the need for development of an owner's mindset from early stages to later stages
- Explain the "how-to" of ownership development based on life stages of both the individual and the family
- Demonstrate how to build one core ownership skill
- Help families assess their ownership development needs



Insight



Takeaway



Action

SESSION WORKBOOK

Forgiveness - A Key Competency for the Successful Family Enterprise | Lloyd Robinson

Session Objectives:

- Position Forgiveness as a key competency for development by family members
- Explore why Forgiveness can positively impact families and family enterprises
- Share a step-by-step Forgiveness methodology
- Use 'real world' examples of Forgiveness attendees can relate to

Mistakes Made, Lessons Learned | Kathleen Wiseman

Session Objectives:

- Critically consider/examine the experience of working in or advising family enterprise
- Take personal risks leading to professional and personal growth
- Remove boundaries having to do with fear of failure and promote new ways to succeed
- Create connections between concepts/practice principles, and implementation



Insight

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Insight



Takeaway

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Takeaway



Action

What would be the benefit for your family, business or advisor practice? Why should your people embrace it?



Action

Diving into the Family Business | Paul Attia

Session Objectives:

- Reflect on the power of storytelling and how we learn from our shared experiences
- Xchanging generational wisdom isn't always easy. Reflect on ways that work and those that don't
- Understand the dilemma of balancing individual wants with the pulls of loyalty and love

 Insight
 Takeaway
 Action

Belonging in a Family Enterprise | Diana Chambers

Families Only

Session Objectives:

- Reflect on what it means to belong to a family enterprise
- Consider ways to manage personal desires with family expectations
- Develop ways that the senior generation might encourage all family members to pursue their unique paths while contributing to the family enterprise

 Insight
 Takeaway
 Action

SESSION WORKBOOK

Green, Yellow, or Red Zone Families: Which Do You Have in Your Advisory Practice? | **Jim Grubman**

Advisors Only

Session Objectives:

- Understand how your biases can interfere with an accurate assessment of your family enterprise client
- Learn how to strike a balance between those things that are common to most family enterprises and those that are unique when developing a process for each family client
- Recognize the key attributes needed to work with family enterprises including cultural heritage, patterns of communication and methods of decision making



Insight

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Takeaway

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Action

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Family Systems and Communication Patterns | **Alberta Business Family Institute, Shauna Feth and Val Monk**

Session Objectives:

- Develop deeper awareness and clarity about your communication patterns
- Assess and improve the communication practices in Family, Business and Ownership systems
- Increase confidence in managing the natural dilemmas that occur in different stages of family business growth and succession
- Recognize that healthy effective communication is the result of an intentional and conscious commitment



Insight



Takeaway



Action

De Kuyper Royal Distillers: The Tale of the Cocktail | Vanessa Strike

Session Objectives:

- The impact of different perspectives across generations within a family firm
- The need for a clear and impartial succession process within a family firm
- Different types of succession models
- The importance of recognizing the iterative testing process as a successor



Insight



Takeaway



Action

Becoming a “Learning Family Enterprise” - A Key Element in Your Family’s Success | Jim Grubman

Session Objectives:

- Understand what it means to be a “learning family enterprise” and why this could matter to you
- Explore different ways that multiple generations can work together and learn together
- Look at the reasons behind the different approaches to learning often held by senior and rising generations



Insight



Takeaway



Action

SESSION WORKBOOK

Are You “Wealthy”? | Patricia Angus

Families Only

Session Objectives:

- Put family “wealth” in context
- Help family participants identify common purpose
- Enable deeper conversations (beyond tools/techniques to underlying assumptions/motivations)
- Encourage participants to create practical personal and family plans and implementation

Multi-Generation Family Enterprise Panel | Moderator: Margaret-Jean Mannix

Session Objectives:

- What some senior generations are doing to empower and engage the upcoming generation
- Understand the challenges and opportunities that the rising generation see as they consider entering or staying in the family enterprise
- Take away ideas and suggestions that can be discussed and applied within a family enterprise



Insight

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Insight



Takeaway

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Takeaway



Action

What would be the benefit for your family, business or advisor practice? Why should your people embrace it?



Action

NOTES

INTEGRATING MY LEARNING INTO MY WORLD

CARLA WOOD AND DAVID BENTALL



GOALS

What actions/outcomes do you want to accomplish?



TIMELINE

A goal without a timeline is just a dream! Commit to a date and make it happen.



SUCCESS

How will you measure success?
What does success look like to you?



GOALS

What actions/outcomes do you want to accomplish?



TIMELINE

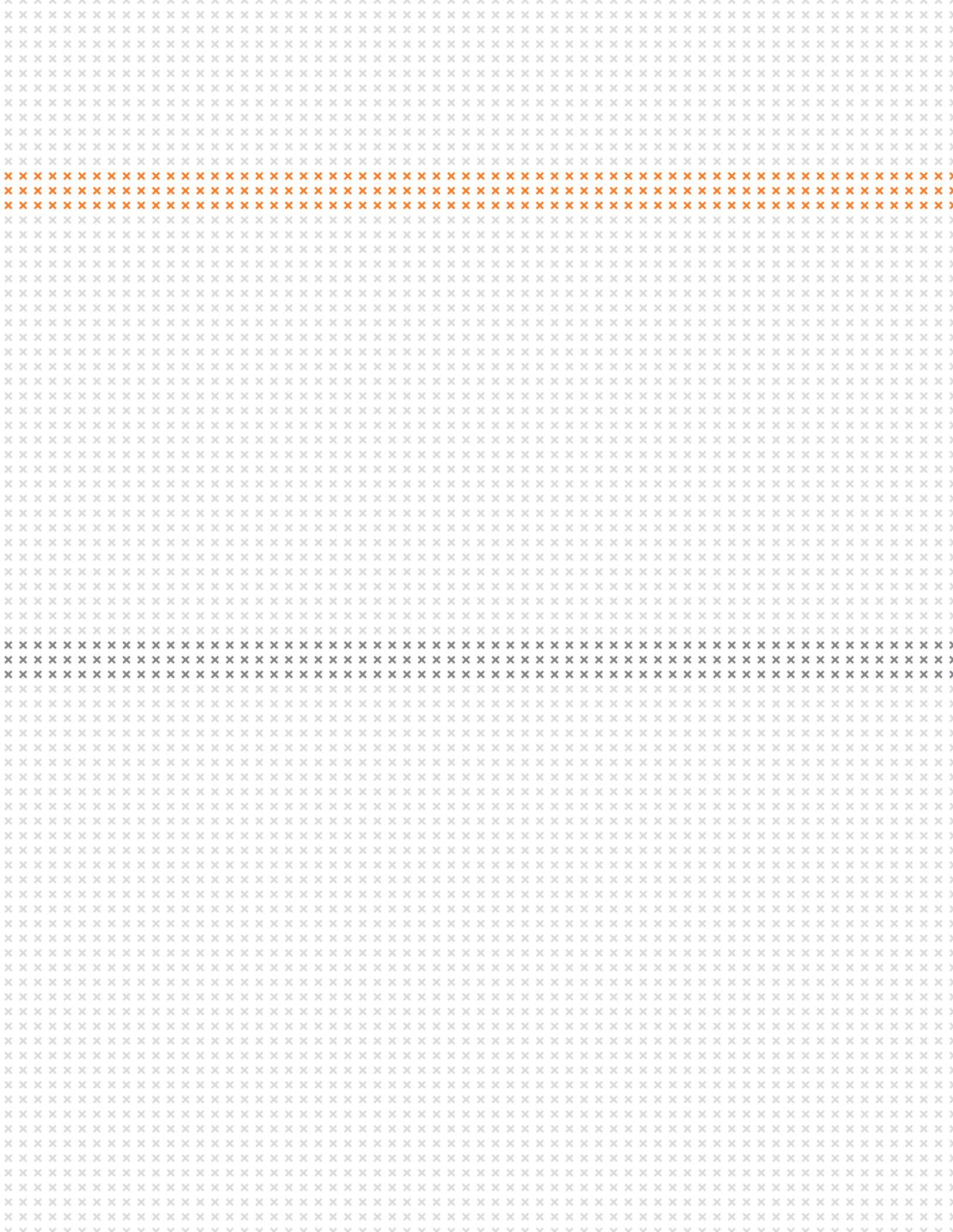
A goal without a timeline is just a dream! Commit to a date and make it happen.



SUCCESS

How will you measure success?
What does success look like to you?







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Hashtags: #FEXSymposium2017 | #XchangingGenerationalWidsom

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