

# The Canadian Association of Family

A national non-profit organization dedicated to promoting the well-being and understanding of families in business.

Tuesday, February 13, 2007

Time: 7:45 a.m. - 11:45 a.m.

(registration & continental breakfast 7:45 a.m. - 8:15 a.m.)

Location: London Hunt & Country Club, 1431 Oxford Street West, London

Host: SelectPath Benefits & Financial Inc., a CAFE Associate Member

## Family Business Basics & Family Councils

Without continuity planning, research suggests 90% of family businesses will not survive to the third generation. Families sometimes find themselves floundering in confusion, lack of process, ill-defined roles and poor communication when it comes to their family business. Unfortunately, most families tend to flounder in isolation. They don't realize that **proven solutions exist**, and that getting clear on a few basic concepts can be the "aha" experience that starts to unravel the confusion.

The primary goal of our session is to give you tools to beat the odds — to sustain family harmony and the success of your family business.

In the first half of our program, we will discuss **CAFE's Family Business Basics**. We will introduce you and your family to some fundamental precepts of family business that, when applied, contribute significantly to family business success in this generation and succeeding generations.

In the second half of our program, we will discuss **Family Councils**. We will introduce you to what a Family Council is, the benefits, the pitfalls, how to start it, and how to keep it going. Find out the format designed for families to run effective meetings covering family issues relating to the business like: planning for family participation in the business; recognizing and resolving conflict; opening up the succession process; planning for the future ownership of the business; helping children manage inherited wealth; preserving family values, traditions and history; and managing relations between family and your **Board of Advisors**.

### Session Facilitators:

**Jeff Noble** (Graham Mathews and Partners LLP) senior consultant and experienced advisor and facilitator to family business.

**Jay Paterson** (Empowered Wealth Canada) global entrepreneur and wealth management professional.

**Greg Schinkel** (Unique Training & Development Inc.) author, speaker, trainer, and coach.

**Brent VanParys** (VanParys Micacchi Shippey and Warnick LLP) CA and advisor to family business for 25 years.

**Family Business Family Council Experience:** Sherene Davidson, Sifton Properties Limited

**Family Business Board of Advisors Experience:** David Nettleton, Sertapak Group Packaging Systems

### Highlights

By the end of the session you and your family will be able to manage the conflicting roles of the members of a family business by starting to apply the lessons of the 3-Circle Model immediately with noticeable results. You'll also be able to decide if the time is right for you to:

\* Start and sustain a Family Council (*Do it for family harmony and success*)

\* Establish or add on to an outside board of advisors/directors (*Do it for business continuity planning*)

\* Join a Personal Advisory Group (*Do it for yourself*).

visit: [www.cafeswo.org](http://www.cafeswo.org) for detailed speaker information!

<input checked="" type="checkbox"/> YES!	Please register ____ people ( <b>Non-Members</b> = \$106.00 per person (\$100.00 + \$6.00 GST) ) (receive a \$25.00 credit towards membership upon joining CAFE within 30 days of event scheduled for February 13, 2007)		
	Please register ____ people ( <b>CAFE Members</b> = \$79.50 per person (\$75.00 + \$4.50 GST) )		
	Please register ____ people ( <b>Guest of CAFE Member</b> = \$0.00 per person ) (no charge for Members to bring one Guest)		
	<i>At no charge, CAFE Members can bring a Guest. To qualify for this bonus offer, the Guest must be a non-member who may consider joining CAFE. Consider bringing your family business lawyer or accountant or a friend who is not a CAFE Member because they work with or for family businesses and may wish to join. Register as many members of your family as possible. Learning together is an important part of integrating these concepts into your day-to-day lives.</i>		
<b>Primary Registrant (please specify membership):</b> <input type="checkbox"/> CAFE Member <input type="checkbox"/> Non-Member			
Name/ Title:			
Company:			
Address:		City:	Postal Code:
Telephone:		Fax:	Email:
How did you hear about event? <input type="checkbox"/> Email <input type="checkbox"/> Fax <input type="checkbox"/> Adv <input type="checkbox"/> Website <input type="checkbox"/> Personal Invite <input type="checkbox"/> Other:			
<b>Additional Registrants (please provide contact information Name/Title, Company, Telephone):</b>			
Method of Payment: <input type="checkbox"/> MasterCard <input type="checkbox"/> VISA			Total Amount:
Credit Card #		Expiry Date:	
Card Holder:		Signature:	

**Due to limited space, pre-registration is required. Pre-payment required to confirm reservation. Deadline to register: Friday, February 2<sup>nd</sup>, 2007**

**TO REGISTER:** complete the registration form and fax or email to CAFE – Southwestern Ontario TODAY!  
(No refunds or cancellations will be accepted. Substitutions welcome.)

For more information contact CAFE Southwestern Ontario, PO Box 23034, London, ON N6A 5N9  
Tel: (519) 642-4349 / Fax: (519) 642-2873 / Email: [cafeswo@rogers.com](mailto:cafeswo@rogers.com)

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