

Canadian Association of Family Enterprise
FAMILY BUSINESS FACILITATORS – NATIONAL ROSTER

Name	Company Name & Address	Completion Date	Biography
Beaton, Bill	The Impact Consulting Group Ste 700, 700 - 6th Avenue S.W. Calgary, AB T2P 0T8 Ph: 403-531-9722 Fx: 403-294-1162	October 2000, Calgary, AB	For over twenty years, Bill has served progressive businesses as a trusted business advisor, teacher, facilitator, director and as an interim officer. He currently is the Managing Director of the Calgary-based Impact Consulting Group where he restricts his practice to strategic coaching and facilitation for corporate clients, work groups/boards, managers experiencing change and families in business. Bill brings a rich mix of analytical skills, business acumen, personal family-business experience and a healthy appreciation of the behavioral sciences to each family business engagement. Bill can be contacted at (403) 531-9722 or by e-mail at bdbeaton@shaw.ca
Berta, Joan	DJ Enterprises 12535 Town Line RR1 Moffat, ON L0P 1J0 Ph: 905-691-5260 Fx: 519-824-3733	May 2000, Toronto, ON	Joan is a consultant, coach, facilitator, business strategist, speaker and a CAFE Trained Family Council Facilitator. Founder of an ongoing successful family business with her husband in 1986. Passed National Executive Director of the Canadian Association of Family Enterprise. Active member of several business and community organizations, as well as a consultant to families in business, educational and special interest groups.
Carlin, Francine	Business Harmonizer Group #208-3023 West 4 th Ave Vancouver, BC V6K 1R5 Ph: 604/264-9171 or 250/653-4025 Fx: 604/264-9151 Email: francine@businessharmonizer.com Website: www.businessharmonizer.com	October 2003, Vancouver, BC	Francine Carlin, MA, is the Principle of the Business Harmonizer Group, a consulting firm specializing in family business advising; family business planning and facilitation of family-business harmony. Francine Carlin is dedicated to helping family business leaders mediate and resolve the emotional and relationship issues that affect decision-making thereby creating workable solutions for eliminating the silent barriers to family-business continuity. Francine is a certified <i>Family Business Education Facilitator</i> , with certifications in <i>Family Council Facilitation</i> , the <i>RoadMap Course for Entrepreneurial Families</i> , and the <i>Business Families Foundation Course for Professionals</i> . She is a member of the Canadian Association of Family Enterprise, the Family Firm Institute, and the Succession Network. Francine is Associate Faculty for Royal Roads University, Victoria, BC.

Caryll, David	D.B. Caryll & Associates Inc. 55 Otonabee Avenue Toronto, ON M2M 2S5 Ph: 416-733-4362 Fx: 416-512-9578	October 2002 Toronto, ON	David has more than 30 years of practical experience as a senior human resources executive, business consultant, educator, trainer, sales representative, facilitator, mediator and labour negotiator. He has assisted or worked for a wide variety of companies from large private sector corporations to small and medium sized family and privately held businesses. David is a past president of the <i>ADR Institute of Ontario</i> . He has taught mediation and conflict resolution, which included facilitation and negotiations, to post secondary adult students; and, management & supervisory training to his clients. David brings to his client assignments: solid creative problem solving, dispute resolution experience, outstanding interpersonal skills, non-judgmental attitude, and a keen awareness of the negative impact of unresolved issues/conflicts on families and their businesses.
Corbett, Bill	KPMG 300 -1674 Bertram St. Kelowna, BC V1Y 9G4 Ph: 250-763-5522 Fx: 250-763-0044	October 2000, Calgary, AB	Bill is a C.A. and partner in KPMG Kelowna who has over 25 years experience in serving the needs of families in business in B.C. and Alberta. He is an accredited CAFE Family Council Facilitator and qualified Roadmap Course Facilitator and serves as the Managing Director of CAFE Okanagan. Bill has worked extensively in estate and succession planning and has significant coaching and facilitating experience.
Cowan, John	Cowan Company Inc. 115 First Street, Suite 110 Collingwood, ON L9Y 4W3 Ph: 1-888-929-7411 Fx: 1-888-929-7458	May 2000, Toronto, ON	John is a professional mediator arbitrator and facilitator. He is the third generation in his own family business. John is the co-author of the CAFE Family Council Program and Course Leader in training facilitators for Family Councils. John has worked with dozens of family groups to build effective Family Councils and enjoys the challenge of bringing all the different family dynamics to work together to strengthen both the family and the business. Once the Family Council has been established, John usually acts as moderator of the meetings and helps the family retain it focus on harmony and the self-improvement of all family members.

Cunningham, Judi	Judi Cunningham Consulting 2200 – 1050 W. Pender St. Vancouver, BC V6E 3S7 Ph:604-891-5520 Fx: 604-681-8514	October 2000, Calgary, AB	Judi Cunningham is the Executive Director of the Business Families Centre at the Sauder School of Business, UBC. She was the founding Executive Director for the Business Families Centre and has been instrumental in creating a new field of study at the university. Judi began her career in her own family's business, holding a variety of management and leadership roles as it successfully transitioned from a single controlling owner to a next generation sibling partnership. Judi has fifteen years of experience as an organizational development consultant, facilitator and leadership coach and is a marriage and family therapist. As an instructor, Judi has taught in a variety of settings including the Road Map course for Families in Business, Strategic Planning for the Family Business and the Leader's Window in Executive Education at UBC.
Didkowsky, Victor	Networth Asset Management 330-11th Avenue Calgary, AB T2E 0Z1 Ph: 403-244-7400 Fx: 403-244-8276	November 2002. Calgary	Victor founded Networth Asset Management Inc. in 1994 and is currently the senior financial planner and managing partner of the practice. Professionally, he is a practitioner member of the Canadian Association of Financial Planners (C.A.F.P.), and the Financial Advisors Association (Advocis). Victor is also a member in good standing of The Financial Planner Standards Council (F.P.S.C.). Over the last decade, Victor has consistently been recognized by his licensing dealership, Worldsource Financial Services Inc. as one of their top practitioners, nation-wide. In addition to sitting on their advisory council, Victor in partnership with Worldsource, has been the visionary force behind such innovative, industry leading developments as the 'True Invested' Portfolio statement.
Doerksen, Gerry	Client Insight Inc. P.O. Box 81119 Calgary, AB T2J 2R9 403-278-4045 gdoerksen@clientinsight.ca www.clientinsight.ca	March, 2010 Halifax, NS	Gerry is Founder of Client Insight Inc. a management consultancy that enables successful businesses in the areas of internal development, capacity building and organizational strengthening. His 25 years of business experience includes involvement in large, medium and small businesses as: an owner, manager, business advisor, facilitator, mediator and negotiator. Gerry has first-hand experience as a 3 rd generation family business partner and has worked extensively with family businesses. His interest in other's success and his listening/communication skills help clients gain understanding and clarity as they develop forward moving plans.

Peggy Gates-Hammond,	Private Banker, RBC Wealth Management Royal Bank of Canada 5161 George Street, 4th Floor, Halifax, NS, B3J 1M7 T. 902-421-4966 F. 902-421-7968 E: peggy.gates-hammond@rbc.com	March, 2010 Halifax, NS	Peggy Gates-Hammond, CA, CFP, TEP is a Private Banker with RBC Wealth Management. Peggy has three decades of experience in financial and professional services. Her significant career has honed Ms. Gates-Hammond's ability to serve her clients through all stages of their financial lives. She works as a financial partner with clients, their families and their businesses as well as their legal, tax and insurance advisors to develop customized strategies that act as "road maps" for achieving wealth management goals. Peggy uses her unique combination of interpersonal skills and technical training to help families understand the concept of Family Councils and to facilitate the Family Council communications and experiences.
Heggum-Allen, Terri	Loftus Allen 1388-C Cornwall Road Oakville, ON L6J 7W5 Ph: 905-566-7333 Fx: 905-337-8260	May 2000, Toronto, ON	Terri Heggum-Allen has first hand experience of the challenges and rewards of a family business, as well as professional training in facilitation, mediation and conflict resolution. She brings to the table a unique combination of empathy for her clients and practical expertise in what makes and keeps a business profitable and growing. Perhaps her greatest strength is her ability to help clients develop a long-term strategy for success while dealing with the immediate challenges before them. She can help you.
Helfrich, Greg	Elrus Aggregate Systems 4409 Glenmore Trail S.E. Calgary, AB T2C 2R8 Office (403) 279-7741 Direct (403) 476-7803 Mobile (403)710-3469 Email: ghelfrich@elrus.com	October 2007, Edmonton	Greg was raised in an entrepreneurial family and currently serves as an executive in a long established Calgary family business. Formerly, in private practice as a business operations management consultant, Greg found that families in business needed to overcome communication barriers before they could deal with significant issues the family business faced. As a result, Greg pursued formalized training in facilitation and mediation and practiced both business strategy facilitation and mediated conflict resolution since 2003. Greg completed the CAFE family meeting facilitator course in October 2007. Through constructive dialogue, Greg has helped many business families achieve positive outcomes to their succession and general management processes.

Lobraico, Michael	N.C.I. Solutions 2880 Queen Street, Suite 122 Brampton, ON L6S 6H4 Ph: 905-846-8162 Fx: 905-846-1895	May 2000, Toronto, ON	Michael brings 25+ years of experience in business to his role as President of N.C.I. Solutions Limited, an executive coaching company working senior executives, business families and groups in the area of leadership development. Michael learned and developed his skills in the trenches, operating running and managing many areas of a third generation business family. As a trained facilitator, mediator and public speaker, Michael is sought after for his ability to understand the corporate world as well as his unique understanding of the family dynamic. Michael brings a unique combination of talents, a well rounded approach and an open minded perspective to his clients.
Monk, Val	Val Monk & Associates Box 38028, Bird's Hill P.O. East St. Paul, MB R2E 1H3 Ph: 204-663-5562 Fx: 204-669-8114	May 2000, Toronto, ON	As someone who grew up in a family business that has now been passed on to a second generation, Val Monk has a first hand appreciation of the incredible energy and commitment that goes into a family business. Val has worked in the field of human dynamics for 26 years, as a facilitator, educator, counselor and coach. For the past 15 years, Val has specialized in the area of Business Family Risk Management. She has extensive learning in the area of organizational and family systems, and has completed in-depth research related to business families. Val is an advisor with Alberta Business Family Institute and facilitator for the Roadmap business family education program. She previously held the position of Personal Advisory Group Chair on the CAFE National Board of Directors. In addition, she was a member of the CAFE Family Council Facilitator Advisory Committee. Val has a strong reputation for her enthusiastic and energetic approach, supported by her firm belief in continuous learning and improvement.
Noble, Jeff	NOBLE Advice Suite 2 – 422 Powerline Road Brantford, ON N3R 8A1 Ph: 519-761-2464	October 2001 Toronto, ON	Jeff Noble is a specialist family business advisor, especially sensitive to the unique needs and very nature of family owned enterprises. An active member of CAFE, Jeff is a registered CAFE Family Business Advisor, and CAFE trained family council meetings facilitator. Jeff also earned the designation CMC Certified Management Consultant, a globally recognized credential representing evidence of the highest standards of consulting and adherence to the ethical canons of the profession. Less than 1 percent of all consultants have achieved this level of performance. It is also your assurance that Jeff is committed to continuous learning and development.

<p>Parker, Geoffrey</p>	<p>BMO Nesbitt Burns 1st Canadian Place, Suite 4700 PO Box 150 Toronto, ON M5X 1H3 Ph: 416-359-4740</p>	<p>October 2006 Toronto, ON</p>	<p><i>"Empowering people to achieve their life goals through a holistic approach to personal planning"</i> is Geoff's mission statement. As an investment advisor and financial planner at BMO Nesbitt Burns with a CFA charter, the CFP designation and CAFÉ training in Family Business Meeting Facilitation, Geoff is uniquely qualified to provide a broad range of assistance to you and your family. In his multi-disciplined practice he focuses on developing retirement funding strategies for business owners and professionals and providing general guidance in the areas of business transition and estate planning. Geoff has had experience dealing with family run businesses. Specifically, he has witnessed first-hand the benefits of solid, consensual planning and the problems that can arise when business owners "go it alone".</p>
<p>Paterson, Jay</p>	<p>Empowered Wealth Canada 30 Dupont Street, Suite 102 Waterloo, ON N2J 2G9 Ph: 519-725-7777 Fx: 519-725-0477</p>	<p>October 2002 Toronto, ON</p>	<p>Jay Paterson is a Vision Architect, three decades of successfully designing and building systems that give Canadian families the FREEDOM to focus upon and achieve their Vision of the Future. Co-founder of Empowered Wealth Canada, The True Wealth Optimization™ company and co-developer of an educational process which has been called "<i>the solution to the world's trust and estate problems</i>". Partners in the development of this unique process include:</p> <ul style="list-style-type: none"> ▪ Lee Brower, who is featured in both the movie and the book, "The Secret", ▪ Jay's wife and partner Anne Paterson. ▪ Marshall Thurber ▪ long time friend Craig Keller CA, internationally recognized accountant and business consultant ▪ and Rosanne Rocchi Trust and Estate Partner, Miller Thomson. <p>Our trademarked process has been recognized by Dan Sullivan, founder of the globally successful program The Strategic Coach as 'a transformational process' and recommended by Jack Canfield in his book "The Success Principles." Jay, Anne and Lee are members of an international network of carefully chosen professionals who specialize in helping individuals and families optimize their True Wealth assets, now and for generations to come. Member of CAFE, Jay is a CAFE accredited Family Council Facilitator, and member of the CAFE Client Advisory Group for Southwestern Ontario.</p>

<p>Reger, Jim and Natasha</p>	<p>The Reger Group #205-3795 Carey Road Victoria, BC V8Z 6T8 Ph: 250-475-2225 Fx: 250-475-2205</p>	<p>October 2000, Calgary, AB</p>	<p>This father and daughter facilitation team has assisted many families to recognize and find effective solutions to the common challenges faced by families in business. Jim spent over 25 years in the Information Technology industry including positions of General Manager of Hewlett Packard and President of Mobile Data International. In 1988 Jim formed their family training and facilitation business, and in 1991 daughter Natasha joined full time. Jim is a qualified Roadmap Course Facilitator. He currently sits on the Board of the Vancouver Island Chapter of CAFE and has been active on the CAFE National Family Council Advisory Committee. He has also provided training and guidance to dozens of CAFE Personal Advisory Groups across Canada. Natasha is skilled in workforce development, leadership, and in the design and delivery of training programs and presentations with a focus on improving interpersonal communications. Jim and Natasha are certified CAFE Family Council facilitators who can assist in developing strategies and skills to improve communications and results in your family and business. They work independently or together, which can be beneficial for larger multi-generational families.</p>
<p>Renaud, Philip J. Q.C.</p>	<p>Duncan & Craig LLP 2800 Scotia Place 10060 - Jasper Avenue Edmonton, Alberta T5J 3V9 Ph: 780-428-6036 Direct Line: 780-441-4334 Toll Free: 1-800-782-9409 Fx: 780-969-6374 www.dclp.com</p>	<p>October 2000, Calgary, AB</p>	<p>Phil Renaud is a lawyer and mediator with Duncan & Craig LLP and practices in the area of wills, trusts and estate planning, which includes business succession planning. He has served as a director of CAFE Edmonton and acted as programming chair and advocacy chair for the chapter. He is a frequent lecturer on estate planning issues including the Legal Education Society of Alberta, the Canadian Bar Association and he presented at the CAFE National Symposium 2000 in Edmonton on the subject of "Canada's Estate Tax". Phil has worked with many business and farm families in developing their succession plans. He is a trained mediator and has mediated many estate disputes and family meetings.</p>
<p>Rinald, Shelagh</p>	<p>Shelagh Rinald Rinald Tax Advisory Inc. 841 Yates Street Victoria, BC V8W 1M1 Phone: (250) 361-1300 Fax: (250) 590-1555 shelagh@rcatax.com</p>	<p>May 2000, Toronto, ON</p>	<p>Shelagh combines a clear understanding of her clients' interests and needs with her specialized technical knowledge in the areas of corporate, personal, trust & estate tax planning to ensure that her client's wealth-transition objectives are achieved as effectively and efficiently as possible. As a certified CAFE Family Council Facilitator with extensive experience in working with family businesses, Shelagh is also able to facilitate family meetings to assist clients in anticipating the challenges that typically arise in a family business context and developing the family governance systems and tools to allow for effective communication in addressing these issues as they arise.</p>

Shatilla, Joan	K.D. Displays 54 Highland Drive Shanty Bay, ON L0L 2L0 Ph: 705-835-5529 Fx: 705-835-6136	May 2000, Toronto, ON	Currently retired from the family business, K.D. Displays, Joan is working as a family council facilitator in the Georgian Bay Chapter of CAFE. As a past National Chair for CAFE National, she has had the opportunity to interact with business families across the country. Joan maintains a strong commitment to and optimism for families in businesses. She is uniquely qualified to discuss the challenges and opportunities for families in business, having experienced them first hand, as well as studying the phenomenon through her years in CAFE.
Sibson, Elaine	Executive Director Centre for Family Business and Regional Prosperity Dalhousie University 6100 University Avenue Room 4112 Halifax, N.S. B3H 3J5 Phone: 902-494-3986 Email: elaine.sibson@dal.ca	March 2010 Halifax, NS	Elaine is a retired tax partner of PricewaterhouseCoopers LLP. Most of her career has been spent advising private clients on issues relating to tax planning for succession. Elaine also has significant governance experience and completed her designation under the Institute of Corporate Directors in 2008. She currently serves as Chair of the Workman's Compensation Board of Nova Scotia and is on the executive of the Atlantic Chapter of the Institute of Corporate Directors. She is the Executive Director of the Center for Family Business at Dalhousie University and is assisting in the creation and development of the Centre. She has worked on a consulting basis with a number of private companies on family issues and succession.
Sorge, Tom	Family Wealth Coach Planning Services 610 999 8 th St SW Calgary AB T2R 1J5 PH 403-265-6865 FX 403-410-9172 Email: tom@familywealthcoach.ca	March 2010 Halifax, NS	Tom is co-founder of Family Wealth Coach Planning Services. His goal is to help clients gain clarity around their core values and to reflect these in their financial plans. For over 30 years he has worked with clients initially focusing on insurance and estate planning to an expanded advisory and advocacy role for families, family offices and businesses. Tom is a long standing member of the Boston based Legacy Group and employs the unique process endorsed by Legacy to ensure that their clients achieve clarity, simplicity and peace of mind over their wealth. One of the guiding principles of this process is ensuring clear communication amongst family members through the generations with regular family meetings being at the heart of this. Tom's superior people skills in combination with his on the ground business acumen gained over 30 years serves him well in helping his clients improve communication and work through the challenges of business/wealth succession. Tom is a graduate of the University of Calgary and a member of Advocis and STEP (Society of Trust and Estate Practitioner) He has earned the designations CLU, CFP, ChFC and TEP. His firm, Family Wealth Coach Planning Services is located in Calgary.

Wainer, Alan	Soberman LLP 2 St. Clair Avenue East Suite 1100 Toronto, ON M4T 2T5 T: 416.963.7121 F: 416.964.6454	November 2003 Toronto, ON	Alan has been advising his clients on a wide range of business and support issues pertaining primarily to owner-managed businesses for over 20 years. A great deal of his time has been spent on succession, estate and retirement planning. As a recently accredited CAFÉ Family Council Facilitator, Alan brings to the table the right temperament and experience to allow the family an opportunity to establish Family Council, which can provide the key link between the family and the business.
Wigmore, Susan	President/Owner Calgary Conflict Resolution Services Inc. 3918 4 th Street SW Calgary, AB T2S 1Y5 T: 403-243-3446 F: 403-243-3442	October 2003 Vancouver, AB	Susan Wigmore is a trained mediator and facilitator. Currently, Wigmore mediates for major Calgary corporations, the Federal Human Rights Commission, the Federal Public Works Commission, Alberta's Civil Claims Court and Alberta Family Court Services. She conducts needs analysis and develops individualized training workshops for businesses. She has lectured at the Haskayne School of Business, University of Calgary on Conflict Resolution and Family Businesses. Wigmore is well acquainted with every aspect of dispute resolution and family councils.
Wright, Catherine	The Wright Group 11630 Kingsway Avenue Edmonton, AB T5G 0X5 Ph: 780-701-8178 Fx: 780-426-3007	November 2007 Edmonton, AB	As principal director of The Wright Group, a family business coaching, consulting and training company, Catharine's deep desire is to affect change in family businesses in order to achieve and celebrate extraordinary levels of performance and profits. Her goal is to solve everyday business problems, increase productivity and optimize overall results. Areas of expertise that have particular relevance to families in business include: family council facilitation, succession planning, strategic planning, leadership development and HR systems and processes. Catharine is a CAFÉ trained family council facilitator with the following additional credentials: MBC, PCC (Professional Certified Coach) and Legacy Leadership® Facilitator. Catharine grew up in a family business and has owned a family business.

<p>Zinyk, Don</p>	<p>KPMG 10125 – 102 Street Edmonton, AB T5J 3V8 Ph: 780-429-7362 Fx: 780-429-7379</p>	<p>May 2000, Toronto, ON</p>	<p>Don Zinyk, CA, CFP, a partner with KPMG LLP in Edmonton, has devoted his career to serving family businesses. He has received in-depth training and worked extensively in the area of Succession Planning. Don also has significant experience in facilitative instruction with a number of corporations, including TD Bank and the Government of Canada, and is one of the Edmonton Chapter's instructors for the Roadmap Program.</p>
-------------------	--	---	--