

The Canadian Association for Family Enterprise, Deloitte and The Centre for Family Business and Regional Prosperity at Dalhousie University present:

★ ★ **Succeeding at Succession** ★ ★
Best Practices for Family Enterprises

Thursday morning, January 28, 2010

Kenneth Rowe Mgt Building at 6100 University Ave., 3rd floor - Executive Classroom

Selecting and developing future leaders is a crucial task -- and a big concern for many companies, particularly family business enterprises. Harley Mintz, Deloitte's Vice-Chair and Tax Partner in their Private Client Services area, will share some of his personal experiences and wisdom around the very complex - and much avoided issue - of succession planning.

**Succession Planning - Where to begin?
What's the time cost? Business cost? Family Cost?**

Harley's presentation will be followed by an intimate discussion with a panel of fellow CAFE members; Patrick O'Regan, Shawn Levangie, Ian Wilson, Maura Timmons and Louis Matrion. Dan Jennings of Deloitte and Harley will chat with the group about the ways in which they are working through their succession plan issues and what they are doing to ensure their family businesses survive and continue to thrive into the next generation.

Agenda

- 8:30 am: Registration and Coffee
- 9:00 am: Welcome: Elaine Sibson, Executive Director, Dalhousie Family Business Ctr. For Regional Prosperity
- 9:05 am - 10:00 am: Keynote Speaker - Harley Mintz
- Break
- 10:15 am – 12:00 pm: Sharing and Experiences from our Panel Participants (See attached bios)
- 12:05 pm: Buffet Lunch

\$49 for CAFE Members / \$99 for Non Members—plus HST

(Register additional CAFE members for \$25 /\$75—non member—Includes a buffet lunch)

~ Payment due in advance by MasterCard, Visa or Cheque (payable to CAFE Nova Scotia) ~

RSVP by January 21, 2010

Call: 902-465-2535 or Email: novascotia@cafecanada.ca or Fax this form back to 902-463-6308

YES! Pls. Register: _____

Print name(s) of all attending

Are you a CAFE Member? Yes No

Please process registration fees by: MasterCard Visa Cheque

Card number: _____

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Cardholder Name: _____

Bios



Our Facilitator is Dan Jennings: Dan is a **Vice President with Deloitte's Atlantic Financial Advisory practice**, based in Halifax. He advises Atlantic Canadian businesses on mergers & acquisition, corporate finance, business valuation and succession matters. Dan has spoken many times on corporate finance topics to various business groups throughout Atlantic Canada, including being accepted as an expert witness in the New Brunswick and Nova Scotia courts, as well as the federal Tax Court. Dan is a graduate of Acadia University and is a Chartered Accountant, Chartered Business Valuator and Corporate Finance specialist, allowing him to use the professional designations CA, CBV and CF. Deloitte & Touche is one of Canada's leading professional services firms, offering audit, tax, financial advisory and consulting services to businesses and governments across the country and the Atlantic region, including offices in Saint John, Halifax and St. John's.



Our keynote speaker is Harley Mintz, FCA, CFP, TEP, CPA: Harley is Vice-Chair Tax Partner with **Deloitte's Private Company Services Division**. He holds a Bachelor of Commerce degree, and has CA designation, FCA (Fellowship of the Institute of Chartered Accountants), a CFP degree (Certified Financial Planner), CPA (Certified Public Accountant, US) and TEP (Trust and Estate Practitioner). In addition to being a Vice-Chair, Harley is a tax partner, specializing in succession and estate planning, real estate and financial planning. Harley has authored many articles on accounting and tax subjects for newspapers across Southern Ontario and has appeared frequently on the radio discussing various tax issues. He has also lectured on taxation at the business school of York University, and on CA exam techniques, for several international accounting firms, and Provincial Institutes of Chartered Accountants across Canada.

Meet Our Panel...



Ian Wilson: Ian is the president of **Wilson Fuel**, an eighth generation family business. Wilson Fuel supplies over 250 gas stations throughout Atlantic Canada and provides a complete range of business and residential heating equipment, fuel and services in Nova Scotia. Wilsons has been designated as one of Canada's 50 Best Managed Companies since 2004. Ian is a graduate of Queen's University and Imperial College, University of London. He has been honored as one of Canada's Top Forty Under Forty in 2005 and a Top 50 Atlantic Canadian CEO. Ian is a past president of CAFE NS and past chairman of CAFE Canada. He lives in Halifax with his wife Sarah and children, Finlay and Alexandra.



Shawn Levangie: Shawn is President of **Trail Blazer Products Ltd.** Shawn holds a Commerce Degree from SMU with a major in Marketing. He started working with his father at Trail Blazer Products Ltd. in 1995 and has taken the company from a one-man operation to having 250 distributors and 60 recognized sales associates. Trail Blazer Products Ltd. manufactures quality outdoor products for the lawn and garden and sporting goods markets with distribution in over 40 countries. He is the current president of CAFE Nova Scotia, and the Junior Chamber International named Shawn Outstanding Young Canadian in the category of Accomplishment. Progress Magazine & EDC has also recognized him with an award for success in export development. Shawn is married to Dawna and they have three children, Travis, Natalie and Victoria.



Patrick O'Regan: Patrick is President of O'Regan's Metro Operations. He is a graduate of Saint Francis Xavier University with a Bachelor of Business Administration. He joined the O'Regan's organization full time as a sales and leasing consultant in 1992. He held progressively more senior positions throughout the organization including General Manager of three of O'Regan's dealerships. Patrick has been named one of Canada's Top 40 Under 40. Patrick is very active in the community. He is presently on the Board of Directors for the 2011 Canada Winter Games and a member of the Board for the Dartmouth General Hospital Foundation. He was also chair of Leadership Gifts for the Dartmouth General Hospital's \$4 million dollar capital campaign in 2002-2004. As President, Patrick also sits on O'Regan's Community Fund Committee which contributes \$300,000 annually to hundreds of charities and community organizations.



Maura Timmons: Maura is a principal with **WBLI Chartered Accountants**. She has experience in responding to the taxation needs of clients in a variety of industries. She is experienced in advising on growth and tax strategies for professional services firms and owner managed companies. She handles all HST related issues for WBLI clients. Maura has lectured on taxation matters throughout the Atlantic region including presentations for the Atlantic Provinces Taxation Seminar and Institute of Chartered Accountants of Nova Scotia's Professional Development Week. She has been involved with CAFE NS as a volunteer with the Programming Committee.



Louis J. Matorin: Louis is an associate with **Cox & Palmer's** Halifax office and practices in the areas of Corporate & Commercial, Estates & Trusts and Tax. He was called to the Nova Scotia Bar in 2007, where he received his law degree from Dalhousie Law School in 2006. He is a member of the business law group and is growing his practice in the area of estates and personal tax planning as well as in general corporate law.