ABFI is excited to offer some new and innovative formats for our programs, while continuing to provide our traditional and cornerstone content. New this season, we will be offering a Lunch and Learn series with webinar option, as well as the Business Families Foundation™ online courses for families and advisors. At ABFI we are committed to providing exceptional value for business families and their advisors - we invite you to join us!

Online Registration NOW AVAILABLE!
Members receive a 10% DISCOUNT on all programs listed

Must Reads...

Another Kind of Hero: Preparing Successors for Leadership.
Author: Aronoff, Craig E.; Ward, John L.

The founders of the family business must impart their vision and leadership to succeeding generations. Preparing those generations for leadership is challenging and encompasses a lifetime, but it is critical to the continuity and revitalization of the business.

Building a Successful Family Business Board: A Guide for Leaders, Directors, and Families
Author: Pendergast, Jennifer M; Ward, John L; Brun de Pontet, Stephanie

The book provides best practices for owners and directors with step-by-step guidelines for developing and managing a board—from writing the initial prospectus, through conducting lively meetings, to maintaining open, honest communication between owners, directors, family members, and other stakeholders in the firm.

More than Family: Non-Family Executives in the Family Business
Author: Aronoff, Craig E; Ward, John L.

It is essential to create an environment in which non-family managers can succeed for the good of the business and the good of the family. This book explores the processes of hiring, managing, and retaining talented outside executives.

Looking for articles on conflict resolution or sibling rivalry? In addition to seminars and mentoring/coaching services, the Alberta Business Family Institute places research materials and media covering a wide range of relevant topics at your fingertips. Click here for a list of all our resources. To purchase or borrow any of the above “must read” books call 780.492.0234.
Consider the facts...

Family-owned business:

- Generates approximately 60% of Canada’s Gross Domestic Product
- Employs 6 million workers in Canada (both full-time and part-time)
- Creates 70% of all new jobs in North America
- Provides 55% of all charitable donations

Staggering, isn’t it?

Yet, 70% of family-owned businesses fail before they are passed on to the second generation. That figure jumps to 88% for the third-generation succession and 97% for the fourth.

The Alberta Business Family Institute

Built on the principle that family enterprise is at the heart of the economy, the Alberta Business Family Institute (ABFI) creates a direct link between business families and research and study at the University of Alberta’s Centre for Entrepreneurship and Family Enterprise.

One of the only Canadian universities to offer degrees in Family Enterprise and through alliances with family business organizations worldwide, ABFI is uniquely positioned to provide direct access to essential tools, resources, support, and research-based outreach programs for business families and their advisors in Edmonton, Calgary, and rural Alberta.

ABFI’s Programs:

Our accredited programs are designed to assist business families and their advisors to build on their success. Our content has been created by leading experts in the field of family business.

These programs are certified to provide 6.5 hours of professional development credit through the Alberta Insurance Council.

Passing the Torch
The 12 Steps of Succession Planning

March 25, 2013 | Hanna
April 11, 2013 | Calgary

Time: 8:30a.m. - 4:30p.m.
Cost: $250.00 (plus GST)

Click here for more details and to register.

This full day session will be geared to business owners from all disciplines who seek to deepen their understanding of succession planning and begin the process. Succession planning is a natural process in a successful business, and is one that can (and should) be positive and empowering.

The main focus will be to give an introductory overview of the 12 steps of succession planning and provide materials and templates that will enable business owners to confidently begin the succession planning process.
The Trusted Advisor
April 9, 2013 | Edmonton
April 12, 2013 | Calgary
Time: 8:30a.m. - 4:30p.m.
Cost: $250.00 (plus GST)
Click here for more details or to register.

Trusted advisors are the people a family turns to at a time of crisis. They are accountants, lawyers, insurance brokers, investment advisors, and much more. They are specialized in their field of expertise and generalists in other areas that impact the family business.

This program is designed to provide professionals with an in-depth understanding of the unique issues facing family business owners and the family circle. It will provide practical tools and checklists that add value to an advisor’s technical expertise as they work alongside families in the development of a transition plan.

The tools and checklists are built on the family program 12 step model and will assist the trusted advisor as they support their family through the transition process.

The Road to Retirement
TBA | Edmonton
TBA | Calgary
Time: 8:30a.m. - 4:30p.m.
Cost: $250.00 (plus GST)
Click here for more details or to register.

There are many ways to create a meaningful retirement. This program looks at financial, legacy, and lifestyle planning. For many, retirement includes philanthropy and the establishment of, or involvement with, a foundation. This comprehensive and informative one-day program will help the exiting generation through the retirement process and assist with the set up and implementation of the next phase of life.

RoadMap I and II
TBA
Click here for more details.

RoadMap is designed to blend family needs with business demands. Participants learn to communicate more effectively and understand more fully the different points of view of family and others involved in the business. The program is sensitive and respectful of individual and family issues. Facilitators create a space and framework for constructive and meaningful change.

Business Families Fundamentals for Family Members
Delivered Online - Click here for more details and to register.
Cost: USD $150.00

This 5 hour, self paced, online course introduces you to the fundamental interdependence of family, ownership and business issues, that every family member whether they are involved with a business, with investments, with a family office, or a family foundation will inevitably face. The course will provide you with tools that have been proven successful in addressing the dynamics around these issues.

Business Families Fundamentals for Professionals
Delivered Online - Click here for more details and to register.
Cost: USD $495.00

This 15 hour, self paced, online course is for all Professionals working with or in family businesses. Part One introduces you to the basic notions of family business. Part Two takes you through the essential structures and procedures for a successful family enterprise. Part Three examines the unique dynamics of a family business and guides you through some effective tools and techniques for managing those unique dynamics.

For more information on our services, please contact us.
www.abfi.ca
Lunch and Learn

NEW

Time: 11:00a.m. - 2:00p.m.
Cost: Workshop (includes lunch) $50 (plus GST)
Webinar (lunch not included) $25 (plus GST)

Join us for lunch! Click here for more details and to register.

The Rights of Passage: Tests, Trials, and Tribulations - Assessing Leadership and the Business Successor

May 16, 2013 | Edmonton

Choosing your successor is not just about birth order or education. The next generation of leaders for your family enterprise must be able to lead from a position of respect. Many successors find they are not taken seriously. Many find that they are remembered as the children they used to be and not the leaders they have come to be. This session will provide best practices for assessing future leaders of the family business.

Attracting and Retaining Key Non-Family Employees into the Family Business

May 23, 2013 | Edmonton

Non-Family leadership in your business may be one of the most important steps to the business’ continued success. However, attracting and retaining these staff may not be easy when they are not part of the owning family. This panel will discuss ideas on how to attract and retain these key staff within your family business context including the issues of family and staff dynamics and compensation.

Creating an Outside Board of Directors

TBA (Fall 2013) | Edmonton

Success in transition is not only based on your choice in leadership, but is also impacted by the support and guidance that is in place to help the next generation achieve their vision for corporate success. Building a strong board can provide open non-biased advice and support to your business and family by supplementing the skills and expertise your company will need to be successful in the future.

Your Banker and The Next Generation

June 20, 2013 | Edmonton

In today’s global market place the bank can be your successor’s best friend or biggest hurdle. The relationship that you have spent years nurturing with your financial advisor is not easily transferred on to the next generation. In this session, find out exactly what the bank wishes you would think, say, and do. Discover the key things the next generation can do to strengthen and ensure the successful transition of this powerful relationship.

Reminder...

ABFI Membership for 2013 is due. If you have not already done so, please register online for your family or advisor membership today!

Eric Geddes Breakfast Lecture

“From Zero to 27,000: How a Team Effort Built Birchcliff Energy”

Jeff Tonken, ’78 BCom
President, Chief Executive Officer and Director Birchcliff Energy Ltd.

Thursday, February 7, 2013
University of Alberta Calgary Centre
120, 333 - 5 Avenue SW, Calgary

Cost: $35.00
For more information about this event, please contact Jacqueline at 780.492.6705 (toll free 1.877.362.3222) or email jkokie@ualberta.ca.

Click here to register.