THE FAMILY CHARTER OR
FAMILY CONSTITUTION

DO WE NEED ONE? WHERE DO WE START?

ABFI FAMILY LEADERSHIP SERIES

Date: May 7, 2020

Time: 11:00am - 12:30pm MST

Online Workshop
Learn more about what a Family Charter or Constitution is and what it could do for your family. This session will provide you with the opportunity to draft a good outline on the start of your own Family Charter or Constitution, or ideas on the area you want to revise on your own current document.

Note: Directions on how to setup and connect to the online workshop will be emailed approximately one week before the event.

Presented by:

Patrick O’Connor FEA, CFP, CLU, TEP, CH.F.C
President
Blackwood Family Enterprise Services

Patrick O’Connor has been delivering excellence and thought innovation in the financial services and planning industry for over 35 years. A seasoned planning professional, Patrick is a strategist, coach, and implementer. Patrick’s passion for helping enterprising families can be traced back to his early career in corporate roles with London Life working with business owners and their families. He became frustrated with the traditional industry approach which focused on tactical solutions before obtaining clarity around the vision and values that Patrick thought should drive sound decisions. Identifying the need for a trusted 3rd party to facilitate the difficult conversations required for enterprising families to build a cohesive vision, he left the corporate world in 1999 with a mission to develop a values-based planning process that met this need.

Blackwood Family Enterprise Services is the realization of Patrick’s mission. Blackwood’s collaborative approach brings together all stakeholders and fosters the level of accountability that is essential in creating a family legacy. An exclusively fee-based planning firm, Blackwood has offices in Winnipeg and Calgary. Patrick and his team, which includes his wife, Jennifer, and one of his five daughters, create and sustain long term strategic harmony and legacy for families.

Patrick is committed to making a difference and has spent many hours as a volunteer and a board member with a variety of community-based organizations. When Patrick is setting an ‘out of office’ auto-reply it means he is in Lake of the Woods, Ontario where he fishes, hunts, and exercises to his heart’s content.

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