

# SIGNATURE 2019

## ALBERTA BUSINESS FAMILY INSTITUTE

is proud to honour:

### *The Koeller Family*

of Calvert Home Mortgage  
Investment Corporation

October 24, 2019

The Westin Edmonton

10135 100 Street NW

Edmonton Alberta

October 28, 2019

The Westin Calgary

320 4 Avenue

Calgary Alberta

Registration & Reception 5:00pm

Dinner & Program 6:00pm



## Sponsorship Opportunities

Join ABFI and the Koeller Family as we celebrate 17 years of Signature Events. Position your business as a leader in the field of family business by supporting this Gala Evening.

# Signature 2019

A must-attend Alberta business gala dinner, this annual event featuring over 600 people combined in Edmonton and Calgary, is an opportunity to gain insight into the inner workings of some of Canada's most successful businesses and the families who own them. The Signature Event is ABFI's annual celebration of the history and success of outstanding multi-generational business families.

Featuring an intimate discussion with a prominent business family, this event showcases real life examples and the history and lessons learned from some of Canada's leading business families. It provides a unique opportunity for the business family community to learn, socialize and celebrate success with business family luminaries. And of course it acts as a fundraiser to help ABFI grow, develop and provide educational opportunities to ensure family-run businesses and enterprises have a solid future.

We invite you to join ABFI and the Koeller Family and position your business as a leader in the area of family business by providing sponsorship support of celebrating 17 years of Signature Events.



## Alberta Business Family Institute at the University of Alberta

For 17 years, the Alberta School of Business has helped ensure that family businesses operating in Alberta can succeed for generations to come.

Our leading faculty and unique resources highlight the transformational issues that surround these individuals and focus on a process of communication and governance to facilitate successful transition to the next generation.

The Alberta Business Family Institute (ABFI) at the School of Business is a centre of excellence with an integral focus on family business in Alberta. The Institute is affiliated with the Centre for Entrepreneurship and Family Enterprise, which provides world-class teaching and research in family business and entrepreneurship.

As a leader in family business, the Alberta School of Business, through ABFI, has helped raise awareness and develop a better understanding of the important role that family-based enterprises play in our economy and communities. We have achieved this through producing globally respected research and providing top-tier educational opportunities in family business and entrepreneurship.

Through the Alberta Business Family Institute (ABFI), the School has created unique educational and outreach programs that are tailored to supporting leaders in family business and those advisors who are in place to help facilitate their success to ensure family-run enterprises have a solid future.

## About Calvert Home Mortgage Investment Corporation



Calvert Home Mortgage Investment Corporation is an Alberta Private Mortgage Lender. Since 1975 their goal has always been to provide fast, flexible and value based lending options to mortgage brokers, home owners and real estate investors in the Alberta real estate market. They take pride in their quality service, lasting business relationships and understanding their client's needs on a personal level.

Come and join us for a moderated discussion about the successes and challenges of the Koeller family transition with second generation participants; Dean and Dale Koeller.

This extraordinary family is recognized as a leader in family business as they continue to be driven by passion for helping others, operating under high ethical practices and consistent customer service. They have a business that embraces two generations and spans 40 years of service.

As one past attendee indicated, [“it doesn't feel like a fundraiser, it feels like an educational opportunity.”](#) Everyone learns from hearing this family's story.



### Dean Koeller

Dean is a father of 2, and is known for bringing a wealth of knowledge and energy to his team. As the leader of the Calvert team, Dean quickly committed himself to providing ethical, and consistent customer service, and this is what drives Dean to grow the business and the Calvert brand. Dean is driven by his passion of helping others find and develop success, and to help his clients and colleagues realize their financial goals by being a trusted colleague, mentor, and friend.

Dean Koeller joined Calvert Home Mortgage Investment Corporation in 1997 after receiving his undergraduate in Finance from the University of Calgary.

Dean has been an active AMBA member and has served as a director for two terms, and held positions as treasurer, President and past president. Dean has been the chair of the Private Mortgage Lenders Forum for the last 4 years.



### Dale Koeller

Dale has worked at Calvert Home Mortgage Investment Corporation since 2001. He has been the head underwriter for a number of years, and this has given him the great opportunity to meet a lot of mortgage professionals in this industry, as well as great real estate investors and other borrowers.

Dale is a father of 2 girls, and places strong value on getting to know his clients and colleagues on a personal basis. Dale is known for his strong analytical skills, which helps him give insight into the best financial solution that will serve each unique client. While honing his skills and knowledge of the mortgage industry since 2001, Dale quickly became recognized as a lending leader in the Alberta real estate market.

Dale has been a proud member of the Alberta Mortgage Brokers Association since he joined the industry, and has served on the Board of Directors of AMBA from 2013 through 2015.

*On October 24 and 28, 2019 display your commitment to family business success in Alberta and Canada.*

*Show your leadership to an audience of leading Alberta families and businesses. Promote and build the role of families and their leadership in Alberta communities.*

*Only the Signature Event combines these important goals with an audience of as many as 600 of the most successful and influential business family members in the country.*

*Contact us to discuss which sponsorship level can best meet your needs.*



## Past Signature Families

2018 - Rosenau Family	2011 - Stanton Family
2017 - Gupta Family	2010 - Brewster Family
2016 - Forseth/Bacon Family	2009 - Fuller Family
2015 - Price Family	2008 - Martin Family
2014 - Hutchinson Family	2007 - Asper Family
2013 - Mullen Family	2006 - Shaw Family
2012 - Richardson Family	2005 - Melton Family
	2004 - Ganong Family
	2003 - Richardson Family

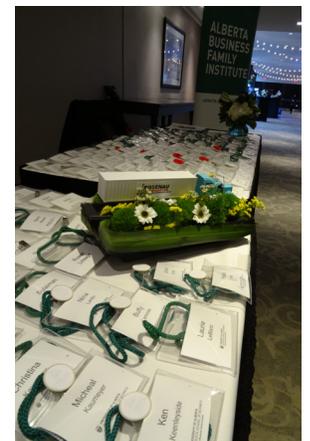
**Insights into successful family enterprises. Valuable advice from business leaders. Road maps to growth and success. The Signature**

**Event delivers these competitive advantages, a venue to meet Alberta's and Canada's business elites in a relaxed, social setting, and an unparalleled opportunity to put your organization front-and-center, with a prestigious sponsorship opportunity like no other in Alberta.**

**With over a million family-owned firms in Canada responsible for more than 60% of Canada's GDP, 50% of employment, and 75% of job creation, business families are a powerful force in the Canadian economy. Understanding what makes them successful is vital for all organizations.**

## As a sponsor of the event, your organization will:

- Enjoy a captive audience with many of Alberta's and Canada's most influential business leaders and their successors
- Demonstrate leadership in this important and emerging field
- Create new or strengthen existing relationships with Canada's largest producers of GDP and growth: members of business families
- Build goodwill by supporting ABFI's education, outreach and research programs targeted at business families
- Participate in an event celebrated as a first-class example of education, substance and purpose, with the families that are some of the largest of their kind in Canada
- Support the groundbreaking efforts of the Alberta Business Family Institute at the School of Business at UofA.



Sponsorship Benefits	Platinum	Gold	Silver	Bronze	**Additional Sponsorship Opportunities		
	\$15,000	\$10,000	\$7,500	\$5,000	\$10,000 Cocktail Reception	\$5,000 Wine Sponsor or Video Sponsor	\$2,500 MBA Student Table
<b>Hosting Opportunities</b>							
Unique opportunity to participate in the Signature Event program (ie.thanking the Signature family, introducing the Signature Family etc.)	Yes						
Includes assigned table of 8 at either Edmonton or Calgary event with Corporate Logo Card	Yes - VIP Placement (Both Cities)	Yes - VIP Placement	Yes - Preferred Placement	Yes - Preferred Placement	Yes - Preferred Placement	Yes - Preferred Placement	Yes - for MBA Students (2 Tables)
<b>On-Site Recognition</b>							
Verbal recognition at each event;	Yes	Yes	Yes		Yes		
<b>Event Marketing Recognition</b>							
Printed recognition in event program	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Printed recognition in multi-media presentation at each event	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Exclusive opportunity to display promotional materials in the reception area;					Yes		
<b>ABFI Program Opportunities</b>							
Complimentary attendance for two individuals to an ABFI education program of choice in 2019/2020:	Yes	Yes					
Passing the Torch – 12 Steps of Succession Planning Workshop; Trusted Advisor Workshop; The Road to Retirement – Retirement, Philanthropy and Setting up a Foundation Workshop; Breakfast Series; Author Series; Partnership Events; Online Programs;							
ABFI annual membership.	Yes	Yes	Yes				
<b>Right of Association</b>							
Right to refer your organization as the sponsor at this level	Platinum Sponsor	Gold Sponsor	Silver Sponsor	Bronze Sponsor	Cocktail Reception Sponsor	Wine Sponsor or Video Sponsor	MBA Student Table Sponsor

# Your opportunity. Your choice.

Consider the tremendous possibilities of partnering with the Alberta Business Family Institute. Quite simply, there are few, if any, sponsorship opportunities that combine access to a privileged audience together with the ability to support world-class events and education for family business and their advisors. Contact us to discuss which sponsorship level best suits your marketing and sponsorship goals.

For sponsorship opportunities:  
Please contact us at  
780.492.0234 | [abfi@ualberta.ca](mailto:abfi@ualberta.ca)  
[www.abfi.ca](http://www.abfi.ca)

The Alberta Business Family Institute  
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10230 Jasper Avenue,  
Edmonton, AB T5J 4P6



UNIVERSITY OF ALBERTA  
ALBERTA SCHOOL OF BUSINESS



RSVP by October 18, 2019

**Ticket price:**

\$275 each or table of eight for \$2200.  
Membership with the Alberta Business Family Institute has its rewards... receive a 10% discount.

**Tickets are available today!**

visit [www.abfi.ca](http://www.abfi.ca) and purchase your tickets online or contact the Alberta Business Family Institute directly at 780.492.0234 or email: [abfi@ualberta.ca](mailto:abfi@ualberta.ca)

Tickets are non-refundable after October 21, 2019

*Signature 2018- Rosenau Family of Rosenau Transport Ltd.*