

FAMILY ENTERPRISE LEADERSHIP SERIES



Canadian
Western Bank



UNIVERSITY OF ALBERTA
ALBERTA SCHOOL OF BUSINESS
ALBERTA BUSINESS FAMILY INSTITUTE

Family Enterprise Structure: Creating & Maximizing Your Family Vision, Mission, & Values November 14, 2023 @ 11:30AM - 1:00PM (Online)

In this session you will get concrete data points that will reassure you that all your hard work in this Family Enterprise space will actually pay off for Enterprising Families!

We will share interesting and compelling data around profitability and other key business metrics that will help make the case for why families should create their Family Vision, Mission, and Values.

This session will explore why it is true that families that put the effort into building out these key family enterprise structures experience better financial results than other family business.

With the “Why” firmly established, we will cover the primary best practices for families to use when they set out to create their Family Vision, Mission, and Values.

Presenter: David Blom **Blackwood Family Enterprise Services**

Inspired by working in his family’s glass construction company, David obtained a CA designation to help other enterprising families. Specializing in providing estate and succession planning services, David has over 30 years of experience in servicing enterprising families. Seeing how families and companies were negatively impacted by inadequate succession planning motivated David to obtain his FEA designation and develop his own enterprise advisory practice.

A skilled family enterprise advisor, David wants Blackwood’s enterprising families to develop a clear picture of their purpose and long-term vision. He is excited by the sense of calm and focus that a family gets when they see clarity in their future direction. Building from the big picture and working on the vital, but sometimes non-urgent matters, David helps families make consistent and better strategic decisions. His extensive experience in tax planning, governance, and business succession mean David can step back and look at all aspects of a problem or an opportunity and guide a plan that is specific to each family’s unique DNA. David also sits on several private and not for profit board, which provides him with a unique view into family enterprises that he can leverage in his work.

David is a passionate outdoorsperson and conversationist. Raised with the attitude that we all have a responsibility to leave the land in a better state than we found it, David has a 30-year volunteer career with Ducks Unlimited Canada working to conserve wetlands and protect clean water. After serving as president, David retired as Chairman of the Board in 2022. David especially enjoys his time with his wife Joann, children, and grandchildren in Calgary and Nova Scotia.



David Blom
COO/Senior Advisor
Blackwood Family
Enterprise Services



blackwood

CREATE LASTING HARMONY

Presenter: Patrick O'Connor Blackwood Family Enterprise Services

Patrick O'Connor has been delivering excellence and thought innovation in the planning and financial industry for over 35 years. A seasoned planning professional, Patrick's passion for helping enterprising families can be traced back to his early career in corporate roles working with business owners and their families. Frustrated with the traditional industry approach that focused on tactical solutions before obtaining clarity around vision and values, Patrick identified the need for a trusted 3rd party to facilitate the difficult conversations enterprising families required to succeed. In 1999, Patrick set out to develop a values-based planning process that met this need.

Blackwood Family Enterprise Services is the realization of Patrick's mission. In Blackwood, Patrick has brought together a team with a wealth of lived experience and a deep passion for helping families find harmony as they work through the intricacies and challenges of their enterprises. Blackwood's collaborative approach brings together all stakeholders and delivers essential accountability that will mean the family reaches their desired future state. Working together with families to identify the shared values that will shape their vision, Blackwood then develops the strategies and tools to achieve family, ownership, and business goals. An exclusively fee-based firm, Blackwood has locations in Manitoba, Alberta, Ontario, and Nova Scotia, where the team delivers family enterprise solutions that are as unique as each family.

Patrick's commitment to making a difference means that he has spent many hours as a volunteer and board member with a wide variety of community-based organizations including community centres, Rotary Club, and the Canadian Association of Gift Planners. Currently Patrick is serving as the Vice-President of Ducks Unlimited Canada. When Patrick has set an 'out of office' auto reply it means he is probably at Lake of the Woods, Ontario where he fishes, hunts, and exercises to his heart's content.



**Patrick O'Connor
CEO/Senior Advisor
Blackwood Family
Enterprise Services**



blackwood

CREATE LASTING HARMONY