ALBERTA BUSINESS FAMILY FEA DESIGNATE LIST

ADVISOR

Trained Facilitator

and licensed

Certified in

Mediator

FEA, CEC,

LL.B, LL.M

Stefan O.

Mendenhall,

Moynihan,

O'Connor,

Sangster, CIM,

Michael D.

CFP, CIM, FCSI,

FCPA, FCA,

CMA, FEA,

TEP, FEA

Kurt Shurer,

Kevin D. Algar,

CA, CFP, FEA, B

Jason Enns,

Gordon

Geoff Badger,

CPA, TEP, FEA,

CFP, FEA

ICD.D, FEA

FCPA, LLB,

Angela Caston,

Grayhawk Wealth

| Royal Mutual Funds

| Sorrell Financial Insurance

| P. Leckie Professional

| National Bank |

| Richardson GMP

| Felesky Flynn LLP

| Grant Thornton LLP

| School of Business,

| Cidel

| ATB

| Strates & Implementation, Facilitation, Strategic Planning &

| the resources of RBC together to provide a full suite of advisory

| tailored wealth planning and complex credit solutions. She brings

| Leadership Development • Impact of Family Dynamics and the

| Trudy’s bias is “Communication can resolve anything. The

| means each person has personal power (not power over) in

| the experience for each person to be heard, seen, and understood.

| wiring and human instinct between men, women, and people of all

| with a particular emphasis on family governance, meeting

| Building a trusted relationship and helping my clients take their

| Financial & Risk Management

| Family Wealth Management (portfolio management, private equity,

| Community Foundation and has served various board and

| come with being a part of a family business.

| *financial and operational advisory services,

| resources for companies in transition and growth.

| *business valuation services.

| *interim management and extended-term fractional financial as well

| Penny and her team are willing to work

| By building relationships with her clients based on respect,

| If you have questions about income tax, estate planning, or other

| service basis.

| and ownership circles. Family Council meeting facilitation

| become aligned re: mission, vision, values in the family, business,

| discussions to help multi-generational families to communicate and

| Expert in family governance and helping families to navigate

| extensive financial planning expertise to his clients. Michael’s

| families to deliver sophisticated wealth management solutions.

| philanthropy, business transfer, financial & risk management

| shareholders. Extensive experience in estate planning and

| Advisor in income tax matters to private corporations and their

| reporting, tax planning, intergenerational planning, and technology.

| support to families of wealth. She has extensive experience

| expect a Team approach to address and simplify the complexities

| with monetization for majority shareholders. Recapitalization of

| communication strategies.

| We facilitate: family leadership development, family meeting

| completing the Institute of Corporate Directors program (ICD.D)

| but also a plan that requires a full understanding of the needs,

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