ALBERTA BUSINESS FAMILY INSTITUTE FAMILY ENTERPRISE ADVISOR (FEA)DESIGNATE LIST

Name	Company	Areas of Expertise	Contact/Website
Allison Comeau. FEA, Prosci	Grayhawk Wealth	Family Office Advisory Services, People Change Management Strategies & Implementation, Facilitation, Strategic Planning & Design	www.grayhawkwealth.com
Allison Maher, CA, CPA, CFP, TEP, ICD.d, FEA	Family Wealth Coach	Specializes in working with multigenerational family offices, family businesses and high net worth individuals, with a focus on estate, insurance and succession planning.	https://www.familywealthcoach.com/
Angela Caston, CFP, CSWP, RRC, FCSI, CIM, IIROC, FEA	ATB	Certified financial planner (BFP), Charted Strategic Wealth Professional (CSWP), Registered Retirement Consultant (RRC), Fellow of the Canadina Securities Institute (FCSI), Chartered Investment Manager (CIM)	http://www.albertaprivateclient.com/TheAlbertaPrivateClientTeam/Pages/Private-Client-Advisor---Angela-Caston.aspx
Anne Evamy, FEA	Grayhawk Investment Strategies	Grayhawk is committed to making a difference by forging extraordinary relationships with openness and respect. Our purpose is to have a strong and enduring relationship with each family where we strive to interact with substance and act with humanity.	http://grayhawk.investments/
Christel Frey, PFP, RRC, FEA	ATB	Personal Financial Planner (PFP), Registered Retirement Consultant (RRC)	http://www.albertaprivateclient.com/TheAlbertaPrivateClientTeam/Pages/Private-Client-Advisor---Christel-Frey.aspx
Chris Reichert, MBA, FEA, TEP	Reichert Family Enterprise Advisors Inc.	Realign, plant, grow, thrive across generations. Family governance, strategy, and the 'soft side' of intergenerational continuity planning.	reichertfea.com
Cindy Radu, FCPA, LLB, LLM, TEP, ICD.D, FEA	BDO	Family Office, Family Governance, Family Trust Advisory, Comprehensive Family Wealth Transition, Business Succession	www.bdo.ca/en-ca/our-people/cindy-radu-1/
Daniel Spencer, CFA, CFP, FEA	ATB Investment Management Inc.	Portfolio Management	http://www.atb.com/personal-banking/Pages/Private-Counsel.aspx
David C. Blom, CPA, TEP, FEA, ICD.d	Desiderata Family Enterprise Advisory	As president, David is responsible for the overall operations of the business. His values of excellent client service, trustworthiness, confidentiality and relationship focus is the core of the business operations. David spent 28 years in public accounting with a national accounting firm. In 2012 he left public practice and focused on a few select family clients. The focus of his practice was to assist families in the succession of their businesses on a tax efficient basis. Working intimately with families, David realized that families needed more than just the tools to implement a great tax plan, but also a plan that requires a full understanding of the needs, legacy expectations of the family and how the family relates within and with the business. As a result, he augmented his training by completing the Institute of Corporate Directors program (ICD.D) and enrolling and working on completing a designation in Family Enterprise Advisory services through the Family Enterprise Exchange association. He received this designation in the spring of 2020. This has added to his training and experience in accounting, domestic and international tax, goods and services tax, trusts and estate planning and governance skills. David currently serves on the family advisory boards of his clients, as the Chair of Ducks Unlimited Canada, and as a board member of the Calgary Airport Authority. He has authored and edited national tax publications and papers.	https://desideratafea.ca/
David Emond, CFA, FEA	Cidel	Portfolio construction, Asset Management/Investment Advisory, Trustteeship, Executorship, Estate Planning, Specialized Banking.	https://cidel.com/who-we-are/#!/people/department-wealth-consulting/david-emond
Don Smith, CLU, FEA, TEP	DSI Edtate Planning Inc	Life Insurance for High Net Worth Families	www.dsiestate.com
Don Zinyk, CPA, FEA	Executive Professor with Alberta Business Family Institute at the School of Business, UofA	Managing the impact that family dynamics can have on the management and governance of a family owned business.	https://www.linkedin.com/in/don-zinyk-72384210/
Gena Rotstein, MA, FEA	Karma & Cents Inc	A social impact lab moving individual, families and family enterprises from traditional philanthropy to philanthropy 3.0. At Kama & Cents™ we support family foundations and family enterprises in attaining their social and legacy objectives.	https://karmaandcents.com/
Geoff Badger, CFA, FEA	Canaccord Genuity Corp.	We help affluent families address complex challenges that emerge when business and familyissues conflict. We facilitate: family leadership development, family meeting facilitation, conflict resolution, addressing spousal relationships and communication strategies. We work with families to identify and codify their core values and connect them to their family enterprise and legacy strategies. Philanthropic planning and execution, providing financial education for children and grandchildren. We lead a Team, comprised of a family's trusted advisors, to develop a comprehensive family enterprise and legacy strategy.	www.badgerinvestmentgroup.com
Gordon Anderson CFA, FEA, ICD.d	KASTx Ventures	Actively manage investments in early stage life science companies as well as advise UHNW families on impact investing	www.kastxventures.com
Jason Enns, FEA	RBC Royal Bank	Jason Enns woks with business owners to plan family financial needs for the short and long term. With access to a number of RBC resources, he has successfully assisted multiple family organize their banking, investment, and lending needs. Seeking personal clients with successful business entities with a value of greater than $25 million.	https://contact.rbcwealthmanagement.com/locator/privatebanking/jason.enns
Jeremy Fearnley, CPA, CA, FEA	Grant Thornton LLP	Accountant/Business Advisor	https://www.grantthornton.ca/en/meet-our-people/jeremy-fearnley/
Jim Rea, CPA, CA, FEA	MNP	Expertise in succession, taxation, accounting, valuation, retirement planning and governance	exitsmart.ca
John Fuller, CPA, CA, FEA	Felesky Flynn LLP	Tax Lawyer	www.felesky.com/profiles/k-john-fuller-ca/
Karen Macdonald, CPA, CA, FEA	View Point Group	Family Office Management, Philanthropy, Governance, Legacy Planning	https://viewpointgroup.ca/team
Kari Speaker Smith, CPA, CA, CFP, FEA, B Mgt	Fletcher Mudryk LLP	A partner of the locally-owned Grande Prairie, AB CPA firm Fletcher Mudryk LLP where she has been practicing for over 25 years. Certified as a CPA and FEA, her expertise centers on working with mid-size business owners, entrepreneurs and farm families throughout Alberta and BC, facilitating family succession, wealth preservation and estate planning discussions from a financial, tax and legacy perspective.	https://www.fletchermudryk.com/team/kari-r-a-speaker-smith/
Kevin D. Algar, JD, CIMA®, CFP®, CLU®, TEP, FEA	Algar, Virtue & Associates	Your Wealth, Well Managed® Family CFO® Our 25th Year of Serving Families	www.algarvirtue.com
Kurt Shurer, CPA, CGA, FEA	Duff & Phelps	Business Transition Specialist for Successful Entrepreneurs looking beyond straight-forward family transitions i.e. Employee Buyouts.Recapitalization of companies involving key management with monetization for majority shareholders. Recapitalization of companies involving key family members. Sale of Business Third parties.	https://www.duffandphelps.com/our-team/kurt-schurer
Lindsay M. MacPhie, CFP, CIM, RIAC, TEP, FEA	The Wooding Group | CIBC Wood Gundy | CIBC Private Wealth	Lindsay works closely with our Clients and their Families to assist them in clearly identifying and articulating their goals, dreams, and obligations. Focusing on each Client's core life objectives, I develop a long-term Wealth Road Map that reflects and accommodates their changing circumstances. This road map includes but is not limited to the following: Family Financial Vision Statements, Investment Strategies, Asset Protection, Trust and Estate Planning, Intergenerational Wealth Transfer and education for the rising generation, Family Governance, Private Foundations/Charitable Giving and Portfolio Management. We work closely with Advisors of different disciplines and believe strongly that Client's deserve and expect a Team approach to address and simplify the complexities of wealth.	www.thewoodinggroup.com
Marguerite Ginn, CPA, CMA, FEA	Viridian Family Office	Marguerite is an established leader and family office expert with over 20 years of long-standing experience in providing dedicated support to families of wealth. She has extensive experience understanding, preserving, and enhancing the legacies of the family clients Viridian serves. Marguerite provides strategic guidance and expertise in multiple areas including estate management, financial reporting, tax planning, intergenerational planning, and technology. Marguerite is a strong advocate for bettering our communities and has extensive knowledge and experience in working with charities and not-for-profit organizations.	www.viridian.ca
Mark Lencucha, FCPA, FCA, TEP, FEA	Mark Lencucha Professional Corporation	Advisor in income tax matters to private corporations and their shareholders. Extensive experience in estate planning and succession planning including adoption and use of FEA principles.	https://www.privatebanking1859.ca/content/gestionprivee1859/en/accueil/a-votre-service/leadership/meghan-meger.html
Mark Starratt, CFP, CIM, FCSI, AIDP™, ICD.D. B. Comm, FEA	Richardson GMP | Starratt Wealth Management	Transition planning, philanthropic planning and execution, family member education, family meeting facilitation, global investment policy statement creation, investment management specializing in volatility management and alternative investments, multidisciplinary collaboration and creation of networks, multi family offices services and planning.	https://dir.richardsongmp.com/web/the.starratt.team/our-team
Meghan Meger, CFP, PFP, TEP, FEA	National Bank | Private Banking 1859	Private banking, customized credit solutions, estate and trusts, portfolio management, derivatives, cash mangagement, philanthropy, business transfer, financial & risk management planning.	
Michael Sadovnick CPA, CA, CPA (AZ), FEA	Partner, Sodovnick Morgan LLP	As both a member of a family business and a family enterprise advisor, Michael understands the complications of dealing with a family first hand. Michael achieved his accounting designation as one of the top in the country and has focused on providing tax, accounting and advisory services to families, professionals, entrepreneurs and ultra high net worth individuals. As a second generation family member he is able to build special relationships with those family members who are waiting to transition in to leadership, while also helping the current family leadership with succession of their advisors and their wealth.	https://www.smllp.ca/portfolio/michael-sadovnick
Michael D. Sangster, CIM, FEA, FMA	Royal Bank of Canada	With over two decades of Wealth Management experience, Michael provides personalized, discreet financial counsel to select families. Michael acts as a "personal CFO," working with his clients and their families to deliver sophisticated wealth management solutions. Michael is a Chartered Investment Manager (CIM) and has earned designations as a Personal Financial Planner (PFP) and Financial Management Advisor (FMA), both of which allow him to provide extensive financial planning expertise to his clients. Michael's specific skill set offers a unique perspective to understand the unique challenges of family enterprises and how to better support them.	http://gestionprivee.rbcgestiondepatrimoine.com/michael.sangster
Myron Uhryn, MBA, FEA	ATB	Wealth management for business owners including exit, succession, estate and financial planning. 30 years experience working with family issues	https://www.atb.com/investing/Pages/wealth-management.aspx
Nadine Weller, CPA, FEA	Weller & Zimaro	CFO Services, Accountant, Business Advisor	https://wzcpa.ca/
Patrick O'Connor, FEA, CFP, CLU, CHFC, TEP	Blackwood Family Enterprise Services	Expert in family governance and helping families to navigate the 'soft side' aspects of inter-generational planning. Facilitate discussions to help multi-generational families to communicate and become aligned re: mission, vision, values in the family, business, and ownership circles. Family Council meeting facilitation Family Conference facilitation (3+ generations at the table). Family Constitutions. Help establish Independent Advisory Boards. Next-gen skill development/preparation, facilitate discussions re: stewardship, roles, expectations, accountabilities, reporting structure Philanthropic planning, family foundations. Facilitate advisor team meetings with incumbent team of legal, accounting and tax professionals. Serving families across Western Canada from offices in Winnipeg and Calgary. Services performed on transparent fee-for-service basis.	www.blackwoodfes.com
Paul E. Moynihan, MBA, FEA	Cardinal	Business Strategy, Mergers & Acquisition, Corporate Fovernance (e.g. Advisory Boards) and Executive Coaching	www.cardinalfa.com
Paul Wheaton, CFA, FEA	Mawer	Investment counselling/investment management	www.mawer.com/about/people/paul-wheaton/
Penny Leckie, CPA.CA, CPA. CMA, TEP, FEA	P. Leckie Professional Corp.	If you have questions about income tax, estate planning, or other financial matters, Chartered Accountant Penny Leckie is the trusted advisor you need. Nicknamed the 'tax therapist' for her personalized approach to tax and estate planning, Penny offers much more than just income tax advice. Penny and her accomplished team at P. Leckie Professional Corporation have the skills and experience to offer solutions for most financial situations. By building relationships with her clients based on respect, understanding, and a desire to help, Penny Leckie has become a leader in the industry. She takes the time to provide individualized service for all of the firm's clients, building relationships with her clients and their families. Penny and her team are willing to work with other advisors to ensure a holistic approach to clients' financial concerns.	www.taxtherapist.ca
Rob Cole, CFP, CLU, CIMA, CIM, FEA	MCS Advisory | CIBC World Markets	Wealth Management Consultant, Portfolio Manager. Experienced wealth manager following a multi-disciplinary advisory process within an integrated wealth management framework. Consulting services offered, estate planning, portfolio management, risk mitigation, family and business succession planning.	https://www.cibcwg.com/web/mcs-advisory/our-team
Robert W. Mendenhall, TEP, LLB, LLM, FEA	Family Office Professional	Family Governance & Dynamics, Legacy Wealth Advising, Facilitation/ Mediation, Succession Planning.	https://www.linkedin.com/in/robert-mendenhall-97882532/
Salvatore Corea, BA, CFP, TEP, FEA	Sorrell Financial	Insurance, risk management and succession planning for the business family.	www.sorrell.ca
Scott Thomas, CFA, CPA,CMA, FEA	RDT Management Group Inc.	"Accounting and Accounting Services -We provide senior leadership resources for companies in transition and growth. Our focus is on: *financial and operational advisory services, *interim management and extended-term fractional financial as well as operational engagements, *business valuation services. Broad industry experience includes agro-business, energy, health-care, technology, professional services, packaged goods, mineral exploration, manufacturing and wholesale distribution- We provide senior leadership resources for companies in transition and growth. Our focus is on: *financial and operational advisory services, *interim management and extended-term fractional financial as well as operational engagements, *business valuation services. Broad industry experience includes agro-business, energy, health-care, technology, professional services, packaged goods, mineral exploration, manufacturing and wholesale distribution.We provide senior leadership resources for companies in transition and growth. Our focus is on: *financial and operational advisory services, *interim management and extended-term fractional financial as well as operational engagements, *business valuation services. Broad industry experience includes agro-business, energy, health-care, technology, professional services, packaged goods, mineral exploration, manufacturing and wholesale distribution."	www.linkedin.com/in/scottlthomas
Shabir Ladha, CA, CPA, FEA	KBH Chartered Accountants	Having been in the accounting industry for 20 years, Shabir Ladha has experienced a wide range of environments, economies and businesses. Becoming a CA in 2001 and later, obtaining his FEA designation in 2017, Shabir never stopped learning. To supplement his work with all clients, he is in the process of becoming a Mindshop Accredited Advisor. The tools Mindshop teaches allow Shabir to be a better advisor; helping his clients uncover and solve all kinds of business challenges including overall business strategy, sales growth, wastage, expansion, employment matters and so much more. The vast experiences Shabir has had equipped him with the tools and knowledge to better assist individuals, business owners, and family-owned businesses, and the families that own them, through start-up, growth, transition, succession and all of the issues that come with being a part of a family business. Now, Shabir's goal is to provide proactive custom-tailored solutions that fit you and your business needs. Financial statements and tax returns are important, but you don't get ahead looking in the rear-view mirror. When Shabir is not in the office, you can find him spending time with his family, playing volleyball or cycling. Shabir is currently a board member and the audit committee chair for the Edmonton Community Foundation and has served various board and committee roles for AIESEC Canada, Youth Empowerment Support Services (YESS), The Edmonton Grads Basketball Association and many more.	http://www.kbh.ca/partners/shabir/
Shawn Hass FEA, FMA, CIM,	RBC Wealth Management | Hass Wealth Advisory Group	Family Office Services & Investment Management	www.hasswealth.com / www.ownerscircle.ca
Stefan O. Erasmus, LLB, FAC (UK), CA, CPA, ICD.D, FEA	Werklund Family Office	Areas of expertise: Family Office start up and executive management Family Governance Trust Management Family Wealth Management (portfolio management, private equity, venture capital) Family dynamics Strategic Philanthropy Financial & Risk Management Business Consulting and Advisory	stefan.erasmus@werklund.com
Steve Nikiforuk, CPA, CA, FEA, ICD.D	Viridian Family Office	Steve is an expert in building trusted relationships with families of wealth and providing tailored personal attention while keeping their best interests at heart. Steve supports Viridian's clients by providing transparent expertise and advice across the entire spectrum of their unique and personal complexities. Steve's extensive experience as a family office professional, financial executive, board member (public, private & not for profit), and professional accountant make him uniquely gifted to lead the Viridian team and to meet the diverse needs of their clients.	www.viridian.ca
Susan Brown, FEA, RRC®, CFP®, CIM®	HollisWealth Insurance Agency Ltd. | Propel Financial Life Management	Financial Management - financial planning, portfolio management, cash flow and tax planning. Insurance Management - ongoing corporate and personal insurance planning. Financial Education Services - Ongoing financial programs and planning for children in the family business. Family Business Consulting - Uncover key themes impacting fmaily and business continuity/ collaboration with other advisors.	https://www.linkedin.com/in/susan-brown-fea-cfp%C2%AE-rrc%C2%AE-cim%C2%AE-9969001a/
Tracey Zehl, FCPA, FCA, FEA	Grant Thornton LLP	I am the Managing Partner and an Assurance Partner with Grant Thornton LLP in Calgary (Alberta South) with over 19 years' experience in helping clients with their audit and assurance needs. Building a trusted relationship and helping my clients take their organization to the next level is my passion. I am focused on serving private businesses and not-for-profit organizations.	https://www.grantthornton.ca/en/meet-our-people/?service=&industry=&segment=&location=&name=Tracey+Zehl
Trish Brister, B.Comm, LL.B, LL.M (candidate), ICD.D, DFEA	Silvertip Family Enterprise Advisory Corporation	Coaching/Advising/Consulting/Public Speaking in the foundational areas of values/culture, strategic entrepreneurship, governance and risk management related to enterprising families, underscoring wellness as a critical component of success for family members, with a particular emphasis on family governance, meeting facilitation and planning for all manner of transitions.	Silvertipadvisory.com
Trudy Pelletier, FEA, CEC, Mediator Certified in Emotional Intelligence and Pro.File leadership assessments. Trained and licensed in Empowering Men and Empowering Women. Trained facilitator in Fierce Conversations	Trudy Pelletier Consulting Inc.	Trudy specializes in family communication, governance, succession, transition, and continuity planning. Families work with Trudy because they resolve their biggest conflicts and relationship/communication challenges. Trudy facilitates family meetings, ownership and strategic business conversations and planning. Trudy educates and teaches conflict resolution, consensus decision-making, communication, as well as the differences in brain wiring and human instinct between men, women, and people of all genders. Trudy's unique ability is in her listening and being 'neutral', creating the experience for each person to be heard, seen, and understood. Trudy specializes in "Facilitating Difficult Conversations" with a 'coach' approach; developing family members and leaders to increase their capacity and effectiveness in communication. Trudy's passion and commitment is, that 'families work'. This means each person has personal power (not power over) in the face of any circumstance. She is an expert at transforming polluted conversational environments and relationships riddled with recurring breakdowns, altering listening levels and clearing family history, enabling love and affinity to be present. Known to produce results in resolving conflict, creating workability, and restoring trust in business, ownership and, especially in the family system. Trudy produces and guides the succession and continuity roadmap, including using data from leadership assessments for decision making. She guides continuity planning with governance structures created from what really matters to individuals and the collective family. Cultivating accountability to honour each other and have the structures and agreements alive in everyday interactions and decisions is key in how Trudy contributes to family enterprise. Working with Trudy provides a unique opportunity to develop leaders in all generations to actively be growing into their 'best' selves. Trudy's bias is "Communication can resolve anything. The problem is most people stop talking." Your willingness to be in the conversation creates new futures while protecting family and assets. Trudy considers working in family enterprise -- working with you as a family -- a privilege and an honour.	trudypelletier.com
Val Monk, FEA	Val Monk & Associates	Areas of Expertise are based on the "soft issues"/ HR/ Behavioral Sciences/ Therapy : • Succcesion Planning • Impact of Succession on Each Generation • Exploring Values, Vision, and Mission • Leadership Development • Impact of Family Dynamics and the 3 circle model • Creating Effective Communication Processes • Family Council Facilitation • Mediation • Stewardship of the Family Business Culture • Managing Change • Parenting • Spousal Relationships in Family Business • Transforming Relationships in Family Business • Exploring Family Systems using the Virginia Satir Model • Therapeutic Counseling	http://valmonk.ca/
Wanda Nadeau, CFP, FCSI, FMA, TEP, FEA	Royal Bank of Canada | Royal Mutual Funds Inc.	Wanda Nadeau brings 31 years of experience in banking and financial services to her role as Private Banker. She provides comprehensive financial management and trusted advisory services for high-net-worth families with a specific focus on business owners and their families. As a dedicated financial planner, Wanda provides tailored wealth planning and complex credit solutions. She brings the resources of RBC together to provide a full suite of advisory services: cash flow, tax, estate, risk management, investment solutions and intergenerational wealth transfer planning.	http://gestionprivee.rbcgestiondepatrimoine.com/wanda.nadeau

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