

The Family Business **FORUM**

FORUM Speakers



Arnold Strub - Perspectives Business Consulting

How being in a PAG helped me sell my business - and I still blew it

Arnie Strub was selling his family's 80-year-old pickle business. Years of participation in a PAG group had taught him many lessons on the "do's" and "don'ts" when selling your business...and it still went wrong. Arnie will take you on his journey so that you can, hopefully, avoid the same pitfalls when you transfer your business.



Robin Kovitz - Jet Star Capital

Once a Business Family - Always a Business Family

Reflecting on the sale of their 3rd Generation "Original Family Business", Robin looks at the lessons learned from the experience as a family; how her time spent working outside the family firm has added depth to their team and brought the business family closer. Robin looks to the future. The hopes of the Kovitz family to build upon success through long term investment, and their promise to bring understanding and skills to the table in order to help another family business in their transition.



Paul Kerrigan - Alpha Poly

Succession Planning, Transition from Founder to Second Generation

My dream always was to have a business my children could eventually takeover. In 1989 Alpha Polybag Corporation was founded with 2 employees, 2 bag machines, and 3,000 sq ' of space began manufacturing garbage bags. Today, the transition to 2nd generation is pretty well completed and Alpha Poly Corporation is a much different company with 50 employees, 53,000 sq ', 400 stocking products and a wide variety of custom printed and plain products sold across Canada and the US market. Learn how my dream became a reality!



Mitch Silverstein – SBLR LLP

Taming The Tax Beast For Family Business Owners: Strategies To Drive Down Taxes Nobody enjoys paying tax – it's a necessary evil, but that doesn't mean you should pay more than you have to. There are a variety of high-impact strategies business owners can employ, in order to send less of your hard-earned money to the government.

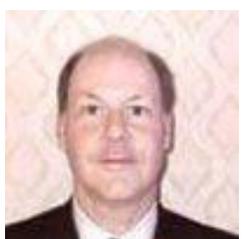
Mitch isn't a stereotypical, introverted accountant. His energy is contagious, his strategic thinking is inspiring!!



Albert Luk – Devry Smith Frank LLP Lawyers and Mediators

The Not So Accidental Succession

It is easier to get into a business than to get out. Albert looks at the legal issues of passing the business on to family, selling to third parties or converting a family enterprise into a non-family enterprise. His presentation will look at both the corporate and wills/estates aspects of these options and provide some helpful tips for the audience to consider.



Larry Klar– Argosy Partners, Succession Fund

Equity to Help Your Family Succeed in Business Succession

The Succession Fund of Toronto buys shares from selling shareholders in owner-operated businesses, and helps resolve family business ownership transition issues. The Succession Fund adds value by improving the depth of management teams, and providing financial and strategic input to support corporate growth plans. The Succession Fund helps family business owners/founders achieve a partial liquidity solution by taking "Chips off the Table"™.



Patrick Bermingham – Bermingham Foundation Solutions
The Value of Long Term Planning and Benefit of Short Term Cash Flow”

Patrick will speak about the value of long term planning in a family owned business vs. the danger of short term thinking in today’s market

Patrick will give an overview of the four generations who have run his company, his experience with private equity investment, his buy back of the company and subsequent sale of shares to a Strategic Investor which happens to be “one of the largest construction companies in the world”.



Caroline Abela – Weir Foulds LLP

How to Avoid Family Litigation After You Die

Failing to properly plan your estate can cause a great deal of havoc on your family once you die. The effects of a poorly chosen executor appointment or a poorly constructed will can ultimately result in your family pursuing litigation in an effort to sort out your estate. Caroline will provide some of the framework to ensure that your family does not end up in court over estate issues.

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