

We seek

- with a passion for what they are doing in the field of family enterprise.

You are

- that respect the core FEX values and our

We encourage people who have not presented or spoken before at FEX to respond to this RFP.

This year we have selected topics that have been compiled from surveys, trends and a desire to continue to offer new, fresh and different ideas that push boundaries, inspire thinking, conversation and action. The topics are listed below. We would like to frame the sessions in the format of a thought -provoking question. We have demonstrated examples below of topics that we are particularly interested in seeing presented at Symposium. However, we are open to other topics that meet the above criteria.

- AGING AND MENTAL DECLINE: How to navigate the difficult territory of aging and mental decline, and the impact this has in our families
- PREPARING INHERITORS: What conversations do parents need to be having with the next generation? What skills does someone need who is receiving enough financial resources that they will never need to engage in paid work again?
- THE TRUSTSCAPE: What is the role and impact of trusts and trustee?
- SOCIAL IMPACT: How do we balance social responsibility and profitability?
- FAMILY OFFICE: Do I need a Family Office? Exploring the rise of the Family Office in Canada.
- POST TRANSITION IDENTITY: What now? Who am I if I am not the CEO of the business? Reclaiming identity after a leadership/ownership transition

- ## The Opportunity

- Name and contact information
- Title of WORKSHOP OR SEMINAR (“the Session”)
- Format: is this an interactive workshop? A presentation-style seminar? A panel session with Q and A?
- Session Description
- Session Objectives/Purpose
- The experience participants can expect
- Names of Panelists if relevant
- Desired Audience: Families only? Advisors only? Both?
- YOUR BIO:
Written Bio that speaks to your expertise in this topic, past experiences presenting at conferences and or teaching background (one pages max.)

- Three credible references from organizations or attendees who have participated and/or attended a presentation, program or workshop that you have facilitated.
- Presentation and A/V Needs (projector, screen, audio provided as standard)



Presenter Consideration:

FEX will provide one complimentary Symposium registration per workshop and a reduced rate for additional presenters.

Presenters will give FEX permission to use your name, image, corporate name and logo, etc. in the promotion of the event and permission to post the presentation and related materials on our website.

Will give us permission to record presentation to be made available on FEX website or used in FEX programing in the future.

FEX will supply branded presentation templates which provide space for adding your organizational or personal brand. Presentation may not include any contact information such as website address, email or phone number. All PowerPoint presentations and handouts will be required in advance for review before March 20, 2020.

Note:

- Presentations including proprietary services and/or product will not be considered.
- Workshop and Seminar seating will be theatre style or half-rounds depending on number of attendees and no seating plan can be guaranteed.

Submissions – Deadline Sept. 30th 2019 – Midnight PDT

[Please submit proposals online here.](#) Proposals emailed directly to FEX will not be considered. If you have any problems with the online form please contact Dawn Ainikkal, FEA Program Coordinator via e-mail dainikkal@family-enterprise-xchange.com.