

**Only the FEA designation** prepares advisors to be fluent in the complexities and nuances of serving business families.



### Stand Out

Families are becoming more discerning about the advisors they bring into their fold. The FEA designation will reinforce your standing and expertise in this growing sector.

### Put the FEA Designation to Work for You!

The FEA designation is the benchmark in family enterprise advising. It's for professionals with significant technical knowledge who want to add to their skill set to better serve their family enterprise clients.

### Become Fluent in “Family Enterprise”

The FEA Program – six highly engaging modules and a capstone project – uniquely prepares advisors to navigate the needs of business families by:

- augmenting your formidable technical skills with a more sophisticated level of understanding around family enterprises and their unique challenges;
- raising your interpersonal intelligence and deepening your understanding of how family dynamics can impact the whole enterprise;
- giving you a greater understanding of the implications of your advice and of taking into consideration a broader spectrum of family enterprise-specific issues;
- utilizing a holistic, multi-disciplinary approach where you learn to integrate your discipline with those of other professionals to provide collaborative and complementary advice; and
- expanding your professional network by joining an active community of Family Enterprise Advisors.

### Be a Leader in Family Enterprise Advising

The FEA Program, lead by experts in the field and offered with our partner universities, is a prerequisite to earning the FEA designation. Family Enterprise Canada grants the FEA designation to qualified professionals who fulfill this education criteria and complete a certification process.

To learn more, contact Tim Mohr at [tmohr@familyenterprise.ca](mailto:tmohr@familyenterprise.ca) | [FamilyEnterprise.ca](http://FamilyEnterprise.ca)

Presented by

Education Partners





## Join 450+ Family Enterprise Advisors Who Have Taken Their Careers to the Next Level

“The FEA program taught me how to serve my clients with greater impact. Rather than entering a conversation believing I needed to have a solution readily in mind, I now start by asking more thought provoking questions... It consistently unearths more considerations that lead to better and more meaningful solutions – not just from a financial perspective, but outcomes that serve the family for the better. It’s helped me build stronger client relationships.”

—**Sloan Levett**, CPA, CA, CFP, TEP, FEA | Fuller Landau Family Office Services Inc.

“I’m becoming a go-to person, even if I’m not actively involved in the process itself. So, the FEA designation has been extremely helpful and given me more respect (if I can put it that way). Having those three letters after my name is an additional boost, I think, reputationally.”

—**Elena Hoffstein**, LL.B, FEA, TEP | Miller Thomson LLP

“There is a great deal of distraction in family businesses, deriving from personalities, ownership issues, family involvement/interference and communication issues, both within the business structure and at outside family gatherings. The FEA program provided excellent support and training that has helped me to understand and navigate these complexities.”

—**Nora Jones**, CPA, CA, CFA, MBA, TEP, CFP, FEA | RBC Enterprise Private Client Group

“Widening the definition of the client outside of the founder, expanding the client’s understanding of the entire family enterprise and implementing best practices in family meetings are tools that I can implement on a daily basis to enhance value for my clients.”

—**Lauren Poitras**, CPA, CA, FEA | Scotia Wealth Management

“Being a CFA charter holder, and a holder of the Financial Planner designation, I sought to add an expertise that goes beyond what is usually offered by most wealth professionals. Many of my clients are ultra-high net worth families who currently own and operate a family business. My recent conversations with them, applying what I have learnt over the past year, have truly demonstrated the value of this discipline.”

—**Bassel Hussayni**, CFA, FEA | BMO Banque privée | BMO Gestion privée de placements Inc.

**LEARN MORE** about the program and the value of the designation from designated FEAs.