



Family
Office
Exchange

Global Family Enterprise Council

May 3-4, 2023
Toronto, ON | CA



Proprietary and Confidential



FOX Global Family Enterprise Council 1H 2023

Delivering the Full Potential of Family Capital 2: Entrepreneurship and the Next Gen

VIRTUAL AGENDA

May 3rd & 4th 09:00 AM 2023 Eastern Time (US and Canada)

Join Zoom Meeting

<https://familyoffice.zoom.us/j/8791759819>

Meeting ID: 879 175 9819

Dial by your location

- +1 305 224 1968 US
- +1 309 205 3325 US
- +1 312 626 6799 US (Chicago)
- +1 646 931 3860 US
- +1 929 205 6099 US (New York)
- +1 301 715 8592 US (Washington DC)
- +1 386 347 5053 US
- +1 507 473 4847 US
- +1 564 217 2000 US
- +1 669 444 9171 US
- +1 669 900 6833 US (San Jose)
- +1 689 278 1000 US
- +1 719 359 4580 US
- +1 253 205 0468 US
- +1 253 215 8782 US (Tacoma)
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Meeting ID: 879 175 9819

Find your local number: <https://familyoffice.zoom.us/j/8791759819>



Wednesday, 3rd May 2023

9:00 – 10:45

Welcome, goals of the GFC and participant updates and introductions.

Miguel López de Silanes, Market Leader Intl, GFC Council Chair, FOX

Peter Moustakerski, CEO, GFC Council Co-Chair, FOX

Sara Hamilton, Founder and Chair Board, FOX

We will hear updates from participants on their enterprise families as well as introductions from guests. We will also hear updates from FOX from Founder Sara Hamilton and CEO Peter Moustakerski.

10:45 – 12:00

Discussion on key Investment, Governance and Next Gen education and entrepreneurship trends from 2022-2023

Peter Moustakerski, CEO, GFC Council Co-Chair, FOX

Miguel López de Silanes, Market Leader Intl, GFC Council Chair, FOX

Peter Moustakerski and Miguel López de Silanes will share some of the leading trends we have observed in the first months of 2023 on Governance, Family enterprise resilience building, talent management, and investments, including an in-depth review of the results of the 2022 FOX Global Investment Survey and the key takeaways from the recent Global Investment Forum.

12:00 – 13:00

Lunch Break

13:00 – 14:45

Enterprise Family legacy & Entrepreneurship: Lessons learned from The Morrissette Institute for Entrepreneurship at The Ivey Business School (Canada) and peer dialogue.

Pierre Morrissette, Founder and Executive Chairman, Pelmorex



Eric Morse, Executive Director, Morrissette Institute for Entrepreneurship, Ivey Business School, Western University (Ontario, Canada)

In this session, we will discuss Entrepreneurship as a key Enterprise family legacy project, showcasing the lessons learned from The Morrissette Institute for Entrepreneurship at The Ivey Business School (Canada). We will also discuss topics like the impact of entrepreneurship on an enterprise family, how entrepreneurship can be better supported, and intrapreneurship and entrepreneurship as family goals.

14:45 – 15:00

Break

15:00 – 17:00

Family Case Study: Tsotsorkov group. History, values, vision, businesses, structure and key challenges and peer dialogue

*Dimitar Tsotsorkov; Chairman of the Board, Asarel Medet
Joanna Marinova; Executive Director, Tsotsorkov Family Office*

Dimitar and Joanna will share the history, value, vision, structure, businesses, and key challenges of the Tsotsorkov business group, a very entrepreneurial business group based in Bulgaria, including the new business ventures, the Family Office and their focus on the Tsotsorkov Foundation.

Thursday, 4th May 2023

9:00 –10:30

Next Gen Enterprise Family learning, entrepreneurship, engagement, and development plans – panel discussion with leading experts and next Gen members and peer dialogue



Peter Jaskiewicz, Director and Founder of the Family Enterprise Legacy Institute; Full Professor of Family Enterprise; Next Generation Expert, University of Ottawa, Canada

Patricia Saputo, Co-Founder and Executive Chairperson, Crysalia, Canada

2-3 Next gen members

The session will focus on a few lessons learned and key trends on next gen engagement and development within leading global Enterprise Families.

10:30 – 10:45

Break

10:45 – 12:00

Discussion on how to transfer vital and entrepreneurial hunger from one generation to the next one.

Panel with

- *Sara Hamilton, Founder and Chair Board, FOX*
- *Peter Jaskiewicz, Director and Founder of the Family Enterprise Legacy Institute; Full Professor of Family Enterprise; Next Generation Expert, University of Ottawa, Canada*
- *Patricia Saputo, Co-Founder and Executive Chairperson, Crysalia, Canada*

Facilitated by Miguel López de Silanes, Market Leader Intl, GFC Council Chair, FOX

Peer dialogue facilitated by Sara and Miguel on some lessons learned and Key success factors re transferring vital and entrepreneurial hunger from one generation to the next one in Enterprise Families.

12:00 – 12:30

Key takeaways from GFC and wrap-up



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Global Family Enterprise Council Attendees

Stephanie Traversy

BridgeGreen Capital Inc.
Canada

Sue Nickason

DART Family Office
Canada / Cayman Islands

Sherry Brydson

Family Capital Corporation
Canada

Rob McDonald

Family Capital Corporation
Canada

Mary Mullens

Family Capital Corporation
Canada

Volker Then

Fondazione AIS
Italy

Francisco Alvarez Morphy

ICW Healthcare Ventures
Mexico / Canada

Pierre Morrissette

Pelmorex
Canada

Marc Morrissette

Pelmorex
Canada

Francesco D'Amico

Philos & Partners
Italy

Markus Stadlmann

Tiriac Foundation
Liechtenstein

Dimitar Tsotsorkov

Tsotsorkov FO
Bulgaria

Joana Marinova

Tsotsorkov FO
Bulgaria

Michelle Jezycki

Tsotsorkov FO
USA

Global Family Enterprise Virtual Attendees

Maarten de Groot

VU University
Netherlands

Maurizio Petta

MAIS Holding
Italy

Olivier Perier

SPDG
Belgium



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Global Family Enterprise Members Unable to Attend

Yvette van der Kloet

MerweOord
Netherlands

Manuel Estrelles

Grupo Corporativo Landon
Spain

David Binet

Woodbridge Company
Canada

Session Speakers

(listed in session/speaking order)

Peter Moustakerski

CEO
FOX

Dimitar Tsotsorkov

CEO
Tsotsorkov Family Office

Miguel Lopez de Silanes

Market Leader International
FOX

Peter Jaskiewicz

University Research Chair,
Telfer School of Management
University of Ottawa

Pierre Morrissette,

Founder and Executive Chairman
Pelmorex

Patricia Saputo

Executive Chairperson of the Board
& Strategic Advisor,
Crysalia

Eric Morse

Executive Director,
Morrissette Institute for Entrepreneurship
Ivey Business School

Sara Hamilton

Founder and Board Chair

FOX Team

Sara Hamilton

Founder and Board Chair

Miguel Lopez de Silanes

Market Leader International

Peter Moustakerski

CEO

Ana Yaques

Associate, International
Program Manager

Ken O'Young

Senior Manager, Council Administration



FOX Team Bios

Peter Moustakerski, CEO, FOX



Peter Moustakerski is CEO of Family Office Exchange (FOX), the premier resource for families managing private enterprises and family wealth across generations. For over 30 years, FOX has been recognized as the industry's most exclusive, innovative, and influential community for peer networking and learning, and has provided independent insights, expert guidance, and practical solutions to complex problems related to family transitions and family wealth.

Peter has spent more than 25 years as a C-level strategist and executive across a variety of industries, including wealth management, capital markets, and technology. He is a former family office executive and FOX member, management consultant, and entrepreneur. He has served as a strategy, innovation, and growth leader for a number of private and public companies and founded two start-ups in New York City and China.

Prior to joining FOX, Peter served as Chief Operating Officer of the family office of the founder of Bridgewater Associates, where he worked closely with the principal family members to envision and oversee the redesign of the family office strategy and day-to-day operations to better serve the evolving needs of the family. Before that, Peter was a management consultant at Booz Allen Hamilton, advising many of the world's top C-suite leaders, and a strategy executive at UBS, leading all growth and transformation initiatives for the bank's wealth management organization.

Most recently, Peter was Chief Strategy Officer of News America Marketing, a former News Corp. subsidiary, where he built and led the Corporate Strategy and M&A function and led the company's successful carve-out and sale to a private equity sponsor. In addition, for more than 20 years, Peter has been a contributing writer and researcher with The Economist Intelligence Unit (EIU), and has led many qualitative and quantitative research projects, and written a number of influential white papers for the EIU, NBER, and other research institutions and media publications.

Peter holds an MBA from Columbia Business School and a BSc in Computer Science and Engineering from Zhejiang University in China, and is proficient in Mandarin, Russian, and Bulgarian.



Miguel López de Silanes Gómez, Market Leader International, FOX



Miguel López de Silanes Gómez is the Managing Director for International Members at Family Office Exchange (FOX). He is responsible for delivering FOX services to current members, and actively works to expand the network in Europe and Latin America.

Miguel has most recently been director of the family office for one of Europe's leading real estate families, with specific responsibility for designing and implementing the family's investment strategy and for providing owner education to the younger family members.

Previously, he worked at UBS Wealth Management in New York, Chile, and other locations in Latin America. He began his career at Bain & Company as an Associate Consultant in London and Madrid. He has an M.B.A. from Harvard Business School and a B.A. in Economics from Universidad Pontificia Comillas (ICADE) in Madrid.

Ed Giacomelli, Canadian Specialist, FOX



Ed Giacomelli is based in Toronto and supports FOX as Canadian Market Expert. In his role, Ed works with various Councils, where members can share experiences, ideas and best practices with peers in a confidential environment.

Serving families and operating companies as a trusted advisor for over 25 years in the areas of strategy, family office, capital markets, governance and succession, Ed brings significant experience to FOX and its Canadian members. Most recently, Ed was CEO of Pelmorex Investments Inc. ("PII"), the Morrissette family enterprise, where he continues in his role as an advisor

to, and director of, PII and its core operating company. Prior to PII, he had a successful career as a senior investment banker advising Canadian and international clients on strategic matters.

Ed has also held the positions of senior partner and Managing Director of Crosbie & Company; Head of the Toronto office of Rothschild & Co, the family-controlled Global Advisory firm; and Managing Director of CIBC World Markets. Ed is active in the Toronto community as a member of the President's Council of St. Michael's Hospital Foundation since its inception in 2008, and as a past director of Prostate Cancer Canada until its merger with Canadian Cancer Society. Ed earned an HBA and MBA from the Ivey Business School, Western University.



Sara Hamilton, Founder and Board Chair, FOX



Founder and Board Chair of Family Office Exchange (FOX), Sara is a recognized visionary in the private wealth community. While a trust officer at Harris Bank in Chicago in the late 1980s, Sara witnessed the emergence of family wealth management as an industry. Hundreds of U.S. families became centi-millionaires overnight through leveraged buyouts that spawned private financial offices commonly called family offices, to manage family assets and educate wealth owners. Sara was the first professional to recognize family offices as a complex market segment in wealth management.

Sara founded the Family Office Exchange (FOX) in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision and managing financial transitions. As a result, FOX evolved into a strategist for family enterprises, a platform for sharing family wealth best practices, and an industry advocate for the importance of private capital in a global economy.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives and wealth advisory firms in more than 20 countries. She was named one of the Top 50 Women in Wealth Management by *Wealth Manager* from 2010-2012 and 2019 Outstanding Thought Leader for Wealth Management by *Family Wealth Report*.

Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times* and serves on the executive education faculty of the University of Chicago Booth School of Business where she is an adjunct faculty member for their Private Wealth Management course, offered twice per year in Chicago. She is on the founding boards for the Private Directors Association in Chicago and the Foundation for Gender Equality in New York.



Attendee Bios

Stephanie Traversy, BridgeGreen Capital

Following 30 years in the realms of corporate education, executive leadership coaching, and organizational effectiveness, Stephanie's passion and curiosity led her to the Family Office world. Having focused on engaging and developing top talent within the workforce, a natural progression was to join BridgeGreen Capital, and as Vice President of Governance and Personal Development, she supports the successful transition of Social, Intellectual and Emotional Capital from second to third generation Family members.

Career highlights include managing national and international learning and development teams, implementing strategic CEO and Executive succession plans, designing and facilitating world class leadership programs, executive coaching, and consulting.

Stephanie holds a degree in Journalism, is a certified Executive Coach, Facilitator and Keynote Speaker. Her love of learning is an ideal backdrop for the programs she creates and implements – all of which are grounded in a strength-based philosophy: Cultivating natural excellence results in boundless possibilities.

Sue Nickason, DART Family Office

Sue Nickason is a Director of Dart Family Office, based in the Cayman Islands. Sue also serves as a director of the Cayman Islands Family Office Association and on the board of Cayman Finance. Additionally, she is a member of Private Client Global Elite and

the Investment Migration Council. Originally from Canada, Sue earned a BA from Mount Allison University and an MBA from the University of Guelph.



Sherry Brydson, Family Capital Corporation

Rob McDonald, Family Capital Corporation

Mary Mullens, Family Capital Corporation

Mary Mullens joined Family Capital Corp. in July 2008 as its President. Family Capital Corp. is the private family office of the Brydson Family, a Canadian family with interests in a broad range of businesses. Mary now serves as a director of several family trust companies and as Advisor to the Chair, Special Projects at the family's investment company, Westerkirk Capital Inc.

Mary earned her law degree in 1985 from McGill University, Montreal and has an MBA from the Rotman School of Management at the University of Toronto.

Francisco Alvarez Morphy, ICW Healthcare Ventures

Francisco has more than 30 years of experience as an entrepreneur, founder, senior executive, investor, advisor, and board member in companies across multiple industries in Mexico, USA, Israel, Europe, and Asia. Francisco has a successful proven record of creating innovative partnerships & joint ventures in the Financial Services, Pharmaceutical, Digital Health, Education Technology, Blockchain, Manufacturing, Real Estate, Petrochemical and Oil and Gas sectors, with a focus in international expansion.

Francisco has been in the pharmaceutical industry for the last 28 years specialized in vaccines, compassionate and orphan drugs, diagnostics, diabetes, nutraceuticals, regulatory affairs, and business development.

Francisco has worked closely with the top industry leaders globally such as Serum Institute of India, Japan BCG, Biological E, Biofarma, Seqirus, Pint Pharma, among others.

Francisco serves as an investor and member of the board of Grupo Financiero Intercam, Grupo Laboratorios Imperiales, Defrak, Grupo Idesa, Grupo Questro, Pint Pharma, Evernym, The Innovation & Digital Health Accelerator of the Boston Children's Hospital, Volute, Esh Israel Bank, among other international institutions.



Francisco Alvarez Morphy, ICW Healthcare Ventures (continued)

With a passion for guiding executives through complex situations, accountability, and execution, he is an asset for startups and small to midcap companies looking for acumen in corporate development and organizational restructuring as well as internationalization of their products. He has been a YPO (Young's Presidents Organization) member since 2015.

Maurizio Petta, MAIS Holding

Maurizio Petta is Vice President and CEO of MaIS Holding. He is a Board Member of various leading Italian companies belonging to the Isabella Seràgnoli family or in which the family has a stake. He is also engaged in many boards of not-for-profit organizations and foundations, promoting the social responsibility of entrepreneurs and their families. He is also President of the Isabella Seràgnoli family Foundation.

Maurizio Petta holds a PhD in Communication and one in Theoretical Philosophy, both from the University of Bologna. He has attended postgraduate studies at leading international.

Volker Then, Fondazione AIS

Since 2022 Chief Executive Officer and Member of the Executive Board, Fondazione AIS – Advancing Impact and Sustainability, Bologna; 2006-2021 Executive Director, Centre for Social Investment, Heidelberg University; 1994 – 2006 Bertelsmann Foundation, Senior Programme Officer, last position Director Philanthropy and Foundations, directing Programme Division; 2014-2016 National Advisory Board G7-Social Impact Investment Task Force; involved in setting up the German follow-up organization to the NAB, the “Federal Initiative Impact Investing”; since 2021 Scientific Advisory Board, OECD Global Action “Social and Solidarity Economy”; member of multiple boards in philanthropy and the Non-Profit-Sector, including the former EFC European Foundation centre (now Philea) 1999-2006; the International Committee of the US Council on Foundations (1999-2006); Strategic interests: social investment, impact investment, entrepreneurial and organizational strategy, impact measurement. Interdisciplinary work and relevant bridging between academia and practice.



Pierre Morrissette, Pelmorex

Born in Montreal, Mr. Morrissette completed a degree in Economics at Loyola College in 1968. He completed a master's Business Administration degree from the Richard Ivey School of Business in 1972.

Mr. Morrissette began his career in the banking industry, but by 1977, had shifted to the communications sector. From 1977 to 1979, he was Vice-President of Finance with Telemedia Communications Inc., and the Senior Vice-President and Chief Financial Officer of the company from 1979 to 1982. He served as President of Telemedia Ventures (1983) and was then appointed President and CEO of Canadian Satellite Communications (1983-1989).

Mr. Morrissette founded Pelmorex Media Inc. in 1989, and the company purchased The Weather Network and MeteoMedia in 1993.

Marc Morrissette, Pelmorex

Marc Morrissette is Chief Investment Officer at Pelmorex Investments Inc and Vice-Chair at Pelmorex Corp, best known as the home of The Weather Network.

Marc, son of Pelmorex's Founder and the only other family member involved in the business, has primarily focused his roles in the family business that pursue long term growth and diversification. He honed these skills in previous Strategy & Corporate Development, Product, International Development, and Sales roles at Pelmorex.

Marc started his career at Rogers Media where he helped launch an alternative rock station in the Vancouver market as an Account Manager. Marc is also Executive Director of the Mental Wellness Network foundation, working with several local hospital and non-profit partners to improve access for adolescents navigating the mental health system.

He graduated from Wilfred Laurier University with a B.A. in Communication Studies and a Diploma in Business Administration. More recently, he completed the leadership program at Harvard Business School and achieved Chartered Directors designation at DeGroote School of Business. He devoted a healthy portion of his younger days writing songs for indie folk-rock bands Octoberman and Kids These Days, releasing several albums, being featured in TV shows such as Grey's Anatomy and Degrassi, and performing all over North America and Europe.

Marc currently lives in Ottawa with his wife and two young daughters, both of whom are obsessed with singing and dancing to Katy Perry on repeat.



Francesco D'Amico, Philos & Partners

Mr. D'Amico advises and takes care of the interests of the founding family of Quilvest and of third-party families.

He is a member of the Executive Committee, responsible for all client matters and the development of Quilvest Switzerland (QVS), the multifamily office of Quilvest. In his role in Quilvest, Francesco has conducted a number of international estate planning and family/investment governance projects organizing and managing complex Trusts, Foundations, and legal structures systems.

Mr. D'Amico sits on various boards of family offices and foundations, primarily advising on family governance and family office matters. Prior to joining QVS, Mr. D'Amico was the CEO of UniCredit Private Wealth Advisory, the multi-family office of UniCredit Group. He also headed the Private Banking Marketing Unit of UniCredit-HVB Group (UCI).

Mr. D'Amico joined UCI after 10 years of experience in the Wealth Management industry in Switzerland, as a management consultant and as a banker.

Olivier Perier, SPDG

Olivier Périer was initially trained as an architect. He is the Founding Partner of an architectural firm called Urban Platform. He currently serves as the Managing Director of SPDG, a private holding and management company, since 2010. He has also served as Deputy Chairman of the D'leteren group since June 2014 and Chairman of the Strategic Committee since June 2017. Olivier is also director of several ventures among which are Cleverciti Systems (Chairman of the Board), Global Dental Services (Non-executive director and member of the investment committee) and Amethis Finance (member of the advisory committee).

Olivier's main fields of expertise are in sustainable architecture, urban planning, real estate, city infrastructure & mobility, and urban tech development, as well as in the automotive and transportation industry.

Olivier holds a degree in architecture and urban planning (ULB), the Executive Program for the Automotive Industry (Solvay Business School), and a Certificate in Global Management (INSEAD).



Markus Stadlmann, Tiriac Foundation

After several years in institutional asset management, Markus Stadlmann made the conscious decision to manage private wealth from then on. He held leading investment roles at a bank owned by the Hilti family, at Harald Quandt Holding and HQ Trust, as well as Tiriac International Foundation—the latter since the start of 2020. In previous positions, Markus headed the global discretionary investment team at Barclays Wealth and acted as Chief Investment Officer of Lloyds Private Bank. He graduated from the University of Chicago School of Business, earning an MBA.

Markus has been giving lectures and seminars on business ethics and corporate sustainability at various universities for the last seventeen years. He is married to Christine. They have two sons and two daughters. Markus is a runner and skier.

Dimitar Tsotsorkov, Tsotsorkov Family Office

Dimitar Tsotsorkov is the CEO of the Tsotsorkov Family Office and as such is responsible for overall strategy, governance, culture and investment and business development. Additionally, he serves as Chairman of the Supervisory Board at Asarel Medet JSc, the biggest Bulgarian company specialized in open-pit mining and processing of copper ores, and as CEO at Asarel Investment JSc, Asarel Group's investment vehicle for non-core projects.

Prior to his current roles, Dimitar has worked for GLENCORE and had been the CEO of the Austrian trading company AVC - a JV between Asarel and the biggest Austrian trading house VAIT Linz.

Dimitar has wide-ranging experience in mining, diversified investments, and international trade. He oversees Asarel Medet JSc's 14 new mining projects in Bulgaria, the most advanced of which requires EUR 60m+ of investments and will employ 450+ people directly 2,000+ people indirectly. He is also in charge of numerous non-core investments, including a portfolio of large-scale tourism and hospitality assets, medical care facility, large Bulgarian data center, logistics projects, several JVs and Asarel's annual Innovation Project contest.

Dimitar Tsotsorkov has been recognized as a Sustainable Development Goals (SDG) Pioneer for Digital Transformation and in 2022 became the first manager of a mining company to win the prestigious award.



Dimitar Tsotsorkov, Tsotsorkov Family Office (continued)

Dimitar has a joint Bachelor of Science and Bachelor of Arts degree from Richmond University, London and a master's degree from Westminster University, London. He has also completed the entry course of the EMBA degree in IMD, Lausanne and numerous professional and academic specializations. He is fluent in English, Russian and German.

Joana Marinova, Tsotsorkov Family Office

Joana Marinova attended the University of Toronto on a full scholarship for academic excellence and community leadership. She graduated with high honors in International Relations and Economics. After graduating, she worked for Wellington Management, a leading private investment management firm. An advocate at heart, Joana left the world of finance to pursue her deep commitment to building healthy and vibrant communities through education.

A life-long learner, she has completed a certificate program in management from Harvard Business School and holds an MBA from the American University in Bulgaria, which she attended on a scholarship for NGO specialists. Joana's work is the recipient of numerous awards including the Universal Forum of Cultures in Spain by the United Nations, Harvard's Harbus Award for Excellence in Journalism and Education, and a citation for the state of Massachusetts for achievements in youth work.

During 2020, she designed a project on Roma financial inclusion and led the first Eastern European team to compete and win the international Rockefeller Acumen Social Enterprise Accelerator. After over 25 years of living abroad, Joana returned to Bulgaria in late 2016 in order to contribute her experience to the development of the NGO sector in her native country. With 14 years of experience and a proven track record in organizational leadership, Joana has taken on the role of Executive Director at the "Lachezar Tsotsorkov" Foundation.

Joana is a member of the Management Board of the Bulgarian Donations Forum and the Media Literacy Coalition. She is a member of the "Council of Women in Business in Bulgaria" and part of the ChangeMakers collective.



Michelle Jezycki, Tsotsorkov Family Office

Ms. Jezycki is the President of Trifecta Consulting, a human resources management company. Trifecta specializes in leadership development, executive coaching, human resources development, strategy, team building, retreats and business management. Ms. Jezycki is the former Director of Human Resources for the United States Senate. She is a Visiting Associate Professor at the American University in Bulgaria teaching Leadership in their EMBA program.

Ms. Jezycki also owns a real estate business in the US assisting clients with residential, commercial and investment needs. She is pleased to be advising the Tsotsorkov Family Office.

Maarten de Groot – VU University

Doctor of Philosophy (PhD) candidate at Vrije University Amsterdam School of Business and Economics. His research is focused on wealth preservation and the role of the family office.

Maarten worked in Amsterdam, London, Hong Kong and Frankfurt in investment management and corporate banking. In 1996, he co-founded VermogensGroep, the largest multi-family office in The Netherlands, managing \$20 billion for 100 ultra-high net worth clients.

He served as CEO and sold the company to UBS in the summer of 2008. Maarten serves on the International advisory Board of the Juvenile Diabetes Research Foundation in New York, USA. He founded JDRF in the Netherlands, and he is chairman of the board. Maarten studied quantitative business economics at Vrije Universiteit, Amsterdam, and complemented his education with study at Harvard Business School in Boston, Insead in France and IMD in Lausanne.



Speaker Bios

Patricia Saputo, Crysalia

Patricia is a well-established leader in the Enterprising Family community. After working in Deloitte's tax department, she brought her experience to the Single-Family Office space and expanded her role in the areas of accounting, tax, life insurance, investments, as well as Estate, Succession and Legacy planning.

Eric Morse, Morrisette Institute for Entrepreneurship, Ivey Business School

Eric Morse is the Executive Director of the Western Morrisette Institute for Entrepreneurship Powered by Ivey Business School. Eric is a Professor of Entrepreneurship and holds the Morrisette Chair in Entrepreneurship. He currently serves as Special Advisor to the President and Director of Entrepreneurship at Western University. In this position, Eric also serves as Chair of the Western Entrepreneurship Steering Team. Eric served as Associate Dean Programs for a six-year term, which ended in 2014. Prior to his service as Associate Dean, Eric served as the Inaugural Director of the Morrisette Institute for Entrepreneurship, a post he returned to July 1, 2015. Dr. Morse is the founder of and the Academic Director for Ivey and KPMG Enterprise's QuantumShift Program for Exceptional Entrepreneurs. Over its twenty-year lifetime, the QuantumShift Program has inspired over 800 of Canada's best and brightest entrepreneurs onto even greater success.

Eric's research has been published in top journals around the world including: the Academy of Management Journal, Entrepreneurship Theory & Practice, the Journal of Business Venturing, the Journal of Management, The Strategic Management Journal, and the Sloan Management Review.

Eric has served on the board, been an advisor to, founded, or been an investor in a variety of entrepreneurial start-ups. Dr. Morse actively consults with both private and public enterprises across Canada and around the world.

Peter Jaskiewicz, Telfer School of Management, University of Ottawa

Peter Jaskiewicz conducts quantitative and qualitative research on entrepreneurship and family business. His current research focuses on antecedents of transgenerational entrepreneurship and corporate reputation in family and founder firms. Moreover, Peter researches organizational outcomes of entrepreneurial legacies, managerial pay dispersion, and family dynamics in these firms.



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Peter Jaskiewicz, Telfer School of Management, University of Ottawa (continued)

Peter's research has been published in journals such as Journal of Management Studies, Journal of Management, Journal of Business Venturing, Academy of Management Learning & Education, Entrepreneurship Theory and Practice, Family Business Review, Journal of Small Business Management, and Journal of Business Research.

In his teaching, Peter shares up-to-date knowledge on entrepreneurship, family business and corporate governance with Bachelor, Master, and PhD students. Peter also organized an annual MBA Summer School on "Leadership in Europe" (2006-2008) and led an annual Study Tour on "Governance, Entrepreneurship and Family Business" (2009-2013) in Europe.



MEETING EVALUATION

Your feedback is important to us. To help us plan future meetings, please complete this evaluation form and return it to ayaques@familyoffice.com

If you prefer to complete the evaluation electronically, please use the following QR code to be directed to our online evaluation form.

As always, all information will remain confidential and will be for internal use only.





MEETING EVALUATION

First name _____

Last name _____

Company _____

1) Please rate the "Discussion on key trends shaping the industry" session and speaker.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Session Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Peter Moustakerski	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on the "Discussion on key trends shaping the industry" session.



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2) Please rate the "Enterprise Family legacy & Entrepreneurship: Lessons learned from The Morrissette Institute for Entrepreneurship at The Ivey Business School (Canada) and peer dialogue" session and speakers.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Session Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Pierre Morrissette	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Eric Morse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on the "Enterprise Family legacy & Entrepreneurship: Lessons learned from The Morrissette Institute for Entrepreneurship at The Ivey Business School (Canada) and peer dialogue" session.



3) Please rate the "Family Case Study: Tsotsorkov group. History, values, vision, businesses, structure, key challenges & peer dialogue" session topic and speaker.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Session Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Dimitar Tsotsorkov	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on the "Family Case Study: Tsotsorkov group. History, values, vision, businesses, structure, key challenges & peer dialogue" session.



4) Please rate the "Next Gen Enterprise Family learning, entrepreneurship, engagement, and development plans – panel discussion with leading experts and next Gen members and peer dialogue" session and speakers.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Session Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Peter Jaskiewicz	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Patricia Saputo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Next Gen Panelists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on the "Next Gen Enterprise Family learning, entrepreneurship, engagement, and development plans – panel discussion with leading experts and next Gen members and peer dialogue" session.



5) Please rate the "Discussion on how to transfer vital and entrepreneurial hunger from one generation to the next one" session and speakers.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Session Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Sara Hamilton	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Peter Jaskiewicz	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Patricia Saputo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Miguel Lopez de Silanes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments on the "Discussion on how to transfer vital and entrepreneurial hunger from one generation to the next one" session.



6) Overall, how satisfied are you with the meeting?

- Excellent (4)
- Good (3)
- Fair (2)
- Poor (1)

7) How valuable did you find this meeting related to your membership investment?

- Excellent (4)
- Good (3)
- Fair (2)
- Poor (1)

8) What are some issues/topics would you like presented at upcoming meetings?



9) Are you willing to provide a brief discussion of best practices that your office has adopted at a future meeting? If yes, please share the topic.

10) For those that attended the meeting in Toronto, please rate the Yorkville Royal Sonesta Hotel (Meeting Venue)?

- Excellent (4)
- Good (3)
- Fair (2)
- Poor (1)

Comments on the Yorkville Royal Sonesta Hotel (your accommodations, the service, the dining experience)



11) How satisfied are you with the meeting's social event (Cocktail Reception at Yorkville Royal Sonesta Hotel)?

- Excellent (4)
- Good (3)
- Fair (2)
- Poor (1)

Comments on the meeting's social event (Cocktail Reception at Yorkville Royal Sonesta)



12) How satisfied are you with the meeting's dinner (STK Steakhouse)?

- Excellent (4)
- Good (3)
- Fair (2)
- Poor (1)

Comments on the meeting's dinner (STK Steakhouse)

Any additional comments?
