



Families Summit of Minds

CHARLEVOIX, CANADA
15-17 NOVEMBER 2019

Hosted by:



**Business Families
Foundation**

MONTHLY
BAROMETER
PRESCIENT & SUCCINCT ANALYSIS OF WHAT'S OUT THERE





Families Summit of Minds

CHARLEVOIX, CANADA, 15-17 NOVEMBER 2019

THE SUMMIT OF MINDS EXPLAINED

Why come to the **Families Summit of Minds**?

Gathering principals of enterprising families to reflect on the past, make the most of the present and look to the future is and always has been part of the **Business Families Foundation's** DNA. In line with this tradition, the Monthly Barometer and Business Families Foundation have joined forces to host the inaugural Families Summit of Minds. The summit, conceived around a carefully crafted program, offers its participants a unique opportunity to reflect on the major issues shaping today's complex world and sometimes to challenge their assumptions about them.

You come to Charlevoix to reflect on:

- (1) What's going on?
- (2) What to do?
- (3) How to do it?

Staged in the awe-inspiring mountains of Charlevoix, the three-day **Families Summit of Minds** held in an atmosphere of trust and mindfulness while engaging guests through revitalizing activities set in exceptional natural surroundings to reinvigorate mind, body and spirit. The summit crosses age and gender lines. It explores intergenerational issues and seeks paths for next-gens to Dream-Dare-Do, combining insights and investible ideas for blue-sky thinking with like-minded guests. Prominent thinkers or practitioners frame the conversation, but everybody is a speaker. We count on each participant to add their own personal ingredient and to stir the pot: The Families Summit of Minds is an ideas fair, and many of these ideas have an investible spin.

Friendliness and informality define the Families Summit of Minds. This top-level gathering combines hard thinking and learning with mindfulness and discovery. The program includes experiential activities both inside and out, with a strong emphasis on wellbeing and the importance of re-connecting with nature.

Remember this: our expectation is that you will leave the Families Summit of Minds with (1) a new friend, (2) a new idea and (3) a new project.

Time	Friday 15 November	Location
10.00-12.00	Registration	
12.00-13.00	Light Snack	Foyer de la Salle Multi
13.00-14.30	<p>Mind Mining</p> <p>Gather round and brainstorm. What are your concerns? What are the solutions? Get ready as our Summit facilitators spark conversations on critical themes of family ownership, disruptive technologies, geopolitics, poverty and wealth, leadership, the environment and more. This is an opportunity to harness collective intelligence, create a human-centered future, and find ways to positively impact families, businesses and communities. We set the tone as we explore implications of the Fourth Industrial Revolution, where family enterprise fits in, and how to make sense of it all. Our conversations will frame all 10 Summit sessions.</p> <p><i>With:</i></p> <ul style="list-style-type: none"> • Thierry Malleret, Co-Founder, Monthly Barometer, France • Olivier de Richoufftz, President, Business Families Foundation, Canada <p>Building the “WE”</p> <p>The digital age has widened the generation gap. Young people are more interested in controlling the affects of wealth rather than creating it. Millennials are “opting out” when they should be “stepping in” to their responsibilities. Strong statements, but are they true? In any intergenerational analysis, there are tough questions: What are our ambitions for our business, our economy and our planet? It is time to dismantle the “us and them” mentality and begin to “build the we.”</p> <p><i>In conversation with:</i></p> <ul style="list-style-type: none"> • Margaret-Jean Mannix, 4th-Generation Chair, Loram 99 Corp., Canada • Robert S. Nason, PhD, Entrepreneurship and Society, Concordia University, Canada 	Salle Multi
14.30-15.45	<p>Interacting in Parallel</p> <p>Does Purpose Matter?</p> <p>Increasing concerns about our societies and the environment have given rise to ethically responsible companies that put the notion of “purposeful business” at the core of their activities.</p> <p>“There is only one valid definition of business purpose: to create a customer,” the late Peter Drucker famously said. Other luminaries believe many companies do not know their purpose. Some insist identifying purpose is critical in the search to address the unthinkable: failure. Arguably, purpose is not about profit. Purpose is about how to create business benefits. Join the panel to find out the following:</p> <p>(1) Is there a trade-off between purpose and profit? (2) Will all companies have to become purposeful?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Mark Auger, Executive VP of Investments and Strategic Acquisitions, Groupe Savoie, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Antoine Mayaud, Association Familiale Mulliez, France • Jodie McLean, CEO, Edens, USA • Ido Aharoni, Ambassador, New York University, USA • Olivier Laquinte, Talsom founder, B. Corp, Canada 	Salle Multi



Time	Friday 15 November	Location
	<p>Mens Sana in Corpore Sano</p> <p>The evidence that a healthy mind cannot co-exist with an unhealthy body is incontrovertible. Wellbeing is a personal and societal imperative. In G7 economies, the annual cost of stress to employers is estimated at tens of billions of dollars. Studies have found that businesses receive up to a 200% return on every \$1 invested in staff wellbeing. Are healthier corporate captains better decisions-makers? Can that lead to a better world? In measuring the value of wellness, or risk of its absence, we must ask:</p> <ol style="list-style-type: none">(1) Do we need to move to think?(2) How does wellbeing contribute to better decision-making and higher productivity?(3) How do we distinguish good wellbeing practices from fads? <p><i>Facilitated by:</i></p> <ul style="list-style-type: none">• Mary Anne Malleret, Co-Author of <i>10 Good Reasons to Go for a Walk</i>, France <p><i>With:</i></p> <ul style="list-style-type: none">• Jason Frohlich, Founder, StimaWell North America and Ironman, Canada (Next Gen)• Hubert Mansion, Co-Founder, Université dans la Nature, Belgium• Charles Onu, Founder, Ubenwa, Nigeria (Next Gen)• Philippe Bourguignon, Partner Revolution, Former CEO, Euro Disney, World Economic Forum, USA	Salle Fillion-Labbé
15.45-16.15	Stretch and Tea	Le Foyer
16.15-17.30	Interacting in Parallel	Salle Multi
	<p>Build an Intrapreneurial Mindset</p> <p>It is often said that intrapreneurs are the “secret weapon” of family businesses. It seems a no-brainer that families must embrace intrapreneurial initiatives if they are to thrive and survive. This is the future of enterprising families with the intent to sustain their businesses past three generations. They must move away from a hyper-focus on core business planning and discover new revenue streams by leveraging existing assets and supporting next gens in intrapreneurial initiatives. We ask:</p> <ol style="list-style-type: none">(1) How best to support intrapreneurial initiatives within a family context?(2) What is the role of mentoring?(3) What are the implications of intrapreneurial initiatives on families? <p><i>Facilitated by:</i></p> <ul style="list-style-type: none">• Ken Tencer, CEO, SpyderWorks Inc., Canada <p><i>With:</i></p> <ul style="list-style-type: none">• Tony Bury, Founder and Chairman, Mowgli Foundation, UK• Dan Marom, Innovative Finance and Impact Expert, Israel• Georges Saad, Founder, Spektrum, Canada• Antoine Mayaud, Association Familiale Mulliez, France• Nathalie Marcoux, VP Finance, Capinabel Inc., Canada	

Time	Friday 15 November	Location
	<p>Wealth Preservation vs Value Creation If wealth creation is about ways to generate money then what is wealth value? Is it the notion of meaning, purpose and the usefulness of wealth? Perhaps they are the same. This much is clear: In our modern age the wealthy are under greater scrutiny. Family enterprises must grapple with trends of inequality and changing societal norms and, to a degree, what is expected of their businesses. With the rise of radical inequalities – of wealth, income and opportunities – a growing number of the privileged are questioning the social arrangements underpinning their wealth and the morality of their advantages. Those who derive capital from investments versus those who run businesses for profit underscore the age-old economic comparison theory of rentier class versus entrepreneurial class. We explore meaning behind wealth, broader concepts of wealth’s value and responsibilities associated with wealth. We ask:</p> <p>(1) What differentiates the windfall class from the entrepreneurial one? (2) How can wealth be better deployed for economic and societal gains? (3) Is questioning of the “meaning” of wealth a mirage or a movement?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Robert S. Nason, PhD, Entrepreneurship and Society, Concordia University, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Robert Frances, Founder, Peak Group, Canada • Patricia Saputo, CFO Family Office, Placement Italcant Inc., Canada • William Sheffield, Advisory Board Member, Velan Inc., Family Enterprise Xchange, Canada • Bhoomika Saxena, Co-Founder, Montreal Social Value Fund (Next Gen) 	Salle Fillion-Labbé
17.30-18.30	<p>Take a Break After a dynamic day, it is time to relax, reflect and rejuvenate. Take the time to unwind and recharge at the spa. Be sure to take advantage of the innovative StimaFit electrical muscle stimulation technology and get a taste of cutting-edge wellness technology used by elite athletes.</p>	Spa Nordique Le Germain
18.30-20.00	<p>Cocktails and Concert Why not take in live jazz, bubbly cocktails and canapés in Charlevoix’s renowned art nexus, Galerie d’art Iris? The renowned Iris Art Gallery is a 10-minute stroll from the hotel and boasts exhibits from artists regionwide. Indeed, its works decorate the walls of Le Germain Charlevoix!</p>	Iris Art Gallery
20.00-21.30	<p>Cirque du Soleil Dinner Welcome to Charlevoix, the 1984 birthplace of Cirque du Soleil. The acrobats will set the tone ahead of a mindful journey. We come from all walks of life, yet we’re united by a special chemistry of mutual trust. Let’s get to know one another better.</p>	Salle Multi
21.30	<p>Nightcap Conversation over a nightcap.</p> <p>Fireside Chats Curious about a subject? Take advantage of a cozy atmosphere to have a personal exchange.</p>	Le Square
	<p>Discovering Your Safe Space</p>	Cellier du Bercail
	<p>Back From Iran, Lessons Learned</p>	Cellier des Labours

Time	Saturday 16 November	Location
7.30-11.30	<p>Outdoor & Experiential Activities in Parallel Parc national des Grands-Jardins, a majestic UNESCO-protected site, is an exceptional natural setting where imposing peaks blend into lakes, rivers and rolling plateaus of taiga – the world’s largest biome of pines, spruces and larches. Immerse yourself in landscapes shaped by meteorites, glaciers and fire.</p>	Parc national des Grands Jardins
	<p>Walkshops in Parallel Walkshops are a favored technique of the Monthly Barometer. Working outside while walking makes us more creative and hones our thinking and decision-making capabilities.</p>	
	<p>Round Peg Walkshop Contemplation is our guide as we gain clarity, challenge our thinking, and ask: Where to invest? Human capital or infrastructure? What are the trends? What works for families? Vulnerability is a form of strength, as is luck, because both open us to undiscovered possibilities. No idea is too crazy. No dialogue too controversial.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Ali Borhani, Managing Director, 3Sixty Strategic Advisors Ltd., UK 	La Chouenne trail
	<p>Climbing to the Top Today’s next gens are reshaping family enterprises not as followers, but as extremely capable leaders NxG on a fast track thinking on how to make a difference.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Jason Frohlich, Founder, StimaWell North America and Ironman, Canada (Next Gen) • Jimmy Ung, Intercultural Consultant, Canada (Next Gen) 	Le Mont-du-Lac-des-Cygnés trail
10.00-12.00	<p>The Smart Power of Nature Walkshop Nature is a “smart pill” capable of making us stronger, happier and healthier. Come and experience the rose-tinted effect of walking amidst nature. Everything looks a little more positive. There is more connectedness.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Hubert Mansion, Co-Founder, Université dans la Nature, Belgium • Emilia Tamko, Co-Founder, Université dans la Nature, France 	Le Gros-Pin trail
	<p>Indoor Circus Workshop An alternative to the Parc national des Grands-Jardins: If you’re a team player or want to be a better team player, the Circus Workshop is for you. Discover your strengths and return to your childhood at the same time. Up for some slackline challenges? Maybe a human pyramid? Hula hoops? Get into – and out of – your comfort zone in this exceptionally fun and challenging workshop.</p>	Salle Multi
10.30-12.00	<p>Meaningful Conversations</p>	Salle Fafard
	<p>The Wisdom of the Elder Generation</p> <p><i>With:</i></p> <ul style="list-style-type: none"> • Philippe de Gaspé-Beaubien, Co-Chair, Fondation de Gaspé Beaubien, Canada • Nan-b de Gaspé-Beaubien, Co-Chair, Fondation de Gaspé Beaubien, Canada 	
12.00-13.30	<p>Lunch For those staying indoors, enjoy a comforting lunch to re-energize the body and mind.</p> <p>For those exploring les Grands Jardins, after your hike, enjoy a comforting Charlevoix fondue served with lunch waiting for you at the hotel.</p>	Le Bercail

Time	Saturday 16 November	Location
13.30-14.15	<p>Plenary Tête-à-Tête – The Rise of the Rest Steve Case created “The Rise of the Rest” to demonstrate that you can find compelling investment opportunities outside of the traditional tech hubs, and that in so doing you can contribute to alleviating seemingly intractable problems such as poverty.</p> <p><i>Introduced by:</i></p> <ul style="list-style-type: none"> • Philippe Bourguignon, Partner Revolution, Former CEO, Euro Disney, World Economic Forum, USA <p><i>In conversation with:</i></p> <ul style="list-style-type: none"> • Steve Case, Founder, AOL, Chairman and CEO, Revolution, USA 	Salle Multi
14.15-15.30	<p>Interacting in Parallel</p> <p>Astonishing Impact in Unlikely Places Are investors looking in the wrong places? A new wave of innovation and technological change will come from forgotten communities – the overlooked areas of our world. Tomorrow’s start-ups need not only cluster in the Silicon Valleys. By forming partnerships at grassroots levels, in established industries, they will emerge in the hidden hinterlands. Those who change how they perceive themselves and play to their strengths, will benefit.</p> <p>(1) Where do unlikely opportunities lie and how best can they be uncovered? (2) Can investing in less “trendy” places positively impact the way people live and work? (3) How can we spot fresh opportunities in long-established industries?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Thierry Malleret, Co-Founder, Monthly Barometer, France <p><i>With:</i></p> <ul style="list-style-type: none"> • Steve Case, Founder, AOL, Chairman and CEO, Revolution, USA • Martin Lafrance, Founder, UEats, Canada • Charles Onu, Founder, Ubenwa, Nigeria (Next Gen) • Lina Dieudonné, Co-Founder and Associate, Montreal Social Value Fund, Canada (Next Gen) • Anne Carabin, Co-Founder, Clean Nature, Canada (Next Gen) <p>The Role of Culture The importance of culture in how we do business is paramount. Values and beliefs often intrude in the day to-day workings of family enterprises. Why do many mergers and acquisitions fail? A clash of cultures is often the cause. Imagine the purchase of a used car. You test drive it and have a mechanic look over the engine. Despite your due diligence, the reality only becomes truly evident months after your purchase. You can rigorously scrutinize an existing business based on visible financial numbers, assumptions of a fit, and expert advice. The reality? That becomes evident after the deal. That reality is culture. We ask:</p> <p>(1) Are families sufficiently attuned to the relevance of culture? (2) Is the younger generation better prepared to deal with culture clashes? (3) Can we predict a “culture fit” or “culture war” ahead of new business ventures?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Helen Antoniou, Author of <i>The Story of Eric Molson</i>, the biography of her father-in-law and past chairman of the Molson Coors Brewing Company, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • François de Visscher, Board Member, Beckaert Belgium, USA • James Hewitt, Chairman and CEO, Hewitt Group Inc., Canada • Luis Felipe Cisneros-Martinez, HEC Montréal and Tec de Monterrey, Mexico • Monette Malewski, President and CEO, M Bacal Group, Canada • Greg Hajdarowicz, Co-Founder and Owner, GREMI Group, Luxembourg 	Salle Multi
15.30-16.00	<p>Stretch and Tea</p>	Salle Fillion-Labbé
		Le Foyer

Time	Saturday 16 November	Location
16.00-17.15	<p>Interacting in Parallel</p> <p>Women and Leadership</p> <p>President Obama once famously said: “Not to generalize, but women seem to have a better capacity than men, partly because of their socialisation”. It has been posited that women are more likely to prioritize the needs of others over their own. Others say women act more ethically than men. In the context of family enterprise, women are sometimes referred to as chief emotional officers, invisible giants or the glue that binds family and business. Husbands are counselled to not underestimate the power of their spouses. We ask:</p> <p>(1) Why are women essential to new governance models that help businesses, people and communities thrive? (2) Why society needs women leaders and women as part of leadership teams? (3) How does the performance of family business correlate with women inclusion?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Michelle Osry, Family Enterprise Consulting Practice Leader, Deloitte, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Rachel Kiddell-Monroe, Founder, SeeChange Initiative, Board of Directors, Médecins sans Frontières, Canada • Nan-b de Gaspé Beaubien, Co-Chair, Fondation de Gaspé Beaubien, Canada • Marie Pier Germain, Regional Director, Germain Hôtels, Canada • Françoise Gagnon, CEO, ADGA Group Consulting inc., Canada • Steven Hirth, CEO, S.H. Hirth & Associates, USA 	Salle Multi
	<p>A Question of Time</p> <p>The acceleration of change has created a culture of immediacy so pervasive that some pundits call this new phenomenon the “dictatorship of urgency”. Large family firms are not immune: their life expectancy has decreased from 75 to 15 years in just one generation. Enterprising families must weigh the virtues of long-termism against the threats of short-termism. The past generation alone delivered an onslaught of disruptive innovation that turned sectors upside down, and shunted aside established market-leading firms, products and alliances. At the current rate, in 25 years more than 75% of the S&P 500 will be replaced by new firms. We ask:</p> <p>(1) How can we reclaim time? (2) Is there still time for “patient” capital? (3) How can families reconcile long-term plans and short-term demands?</p> <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Olivier de Richoufftz, President, Business Families Foundation, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Andrew Molson, 7th-Generation Board Member, Molson Coors Brewing Company, Canada • Margaret-Jean Mannix, 4th-Generation Chair, Loram 99 Corp., Canada • Mark Auger, PhD, Exploring Family Strategy in Dynastic Business Families, Canada • François de Visscher, Board Member, Beckaert Belgium, USA 	
17.15-19.15	<p>Take a Break and Get a Book Signed</p> <p>Set yourself up for a bit of downtime. Reset and enjoy a gentle walk by the St. Lawrence River or the rivière du Gouffre. Why not take advantage of the spa to relax. Be sure to take advantage of the innovative StimaFit electrical muscle stimulation technology and get a taste of cutting-edge wellness technology used by elite athletes. You can also discover new books relevant to the topics discussed written by your peers. Discuss and have them signed!</p>	

Time	Saturday 16 November	Location
19.15-21.00	<p>Themed Dinners As you enjoy your well-earned dinner, look to the center of the courtyard and take in the artistry of our sculptor as he works his power saw and woodcarving magic. A fire and light show will make it all the more spectacular! Later, visit the courtyard to see the final artwork – and a fire-eater – up close, before capping the night off.</p>	Le Bercail
	<p>Multilateral Trade Agreements...or Discord? The Canada-EU Comprehensive Economic and Trade Agreement (CETA) will have a positive impact on both sides of the Atlantic, including lower tariffs and rising investments. Yet trade tensions between China and the US, Canada's largest trading partner, are sapping business confidence on both sides of the border. And NAFTA's replacement, the frequently-stalled USMCA, has yet to be ratified. In an era of shifting trade agreements, can trust be restored?</p> <p><i>Discussion facilitated by:</i></p> <ul style="list-style-type: none"> • Ali Borhani, Managing Director, 3Sixty Strategic Advisors Ltd., UK 	
	<p>Tactical Teamwork for Smooth Succession Succession is inevitable. It need not be painful. When next and senior gens join forces for a frank analysis of family firm transition issues, creative brainstorming delivers amazing results. Equal voices. Deep collaboration. New perspectives. All combine to validate fresh ideas and offer realistic solutions to perennial problems. World Café facilitates nimble intergenerational cooperation to isolate specific business transition issues, and generate original ideas towards effective solutions.</p> <p><i>Discussion facilitated by:</i></p> <ul style="list-style-type: none"> • Olivier Laquinte, Founder, Talsom, B. Corp, Canada 	
21.00	<p>What is a Learning Family? Early results from Family Forward, a forthcoming BFF tool to assess family firm strengths and weakness, suggest that receptiveness to family learning could stand some improvement. We canvas dinner table opinion in a bid to understand where and why family firms need help.</p> <p><i>Discussion facilitated by:</i></p> <ul style="list-style-type: none"> • Susan St Amand, Board Member, Family Enterprise Xchange, Canada • Wendy Sage, The Family Business Consulting Group, Canada 	Le Foyer
	<p>Light the Night: A Dazzling Fireside Nightcap Don't go to bed yet. Gather and enjoy a drink! Our mixologist will give your coffee a kick (think flambé and alcohol)! Be dazzled by a bedazzling fire and light show – and firebreather! Watch as our wood sculptor works his breathtaking magic. The fire pit is the place to ease into an Adirondack chair, wrap up warm in a blanket, and have a cozy chat. Pick your conversation.</p> <p>Fireside Chats</p> <p>Back to Beer, the Story of Eric Molson <i>Led by:</i></p> <ul style="list-style-type: none"> • Helen Antoniou, Author of The Story of Eric Molson, the biography of her father-in-law and past chairman of the Molson Coors Brewing Company, Canada <p>Family Affectio Societatis <i>Led by:</i></p> <ul style="list-style-type: none"> • Antoine Mayaud, Association Familiale Mulliez, France <p>Be Fearless <i>Led by:</i></p> <ul style="list-style-type: none"> • Jean Case, CEO, Case Foundation, Author of Be Fearless: 5 Principles for a Life of Breakthroughs and Purpose, USA 	Le Square
		Lounge d'Hiver Germain
		Cellier des Labours
		Cellier du Bercail

Time	Sunday 17 November	Location
7.00-8.00	<p>Rise and Shine A physical and mental workout to get you in shape for the day – and beyond.</p> <p><i>With:</i></p> <ul style="list-style-type: none"> • Jason Frohlich, Founder, StimaWell North America and Ironman, Canada (Next Gen) • Chantal de Malglaive, Stretching Postural Trainer, France 	Spa Nordique Le Germain
8.00-9.00	<p>Breakfast Inspirations</p> <p>Beyond Philanthropy Philanthropists have a common goal: to promote the welfare of others, expressed especially by the generous donation of money to good causes. Some commentators suggest the growth of impact investing is attributed to the criticism of traditional forms of philanthropy, which have been characterized as unsustainable and driven by the whims of the corresponding donors. Enterprising families with a united vision of what the family wants – in terms of legacy – should be well positioned to promote the welfare of others. Where are they headed? Let's discuss.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Scott McCulloch, Journalist, Senior Communications Consultant, Business Families Foundation, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Anita Nowak, Academic Associate, Desautels Faculty of Management, McGill University, Canada <p>Knowing Your Safe Space We all want to feel safe - within our relationships, our environment and with our wealth. Learn how a family can apply the Safe Space as a Governance model to equip the next generation of leaders and owners. Uncover what are the key ingredients to inspire, empower and expand the entire families wealth.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Franco Lombardo, Author of <i>Safe Space: Governance in Action</i>, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Ambreen Bhaloo, The Foray Group, Canada <p>Dream-Dare-Do Intrapreneurship and blue-sky thinking: The rising generation has changed. Dynamic and entrepreneurial, today's next gens are vigorous leaders in bold new start-ups, inspired spin-offs and imaginative incubators. They're start-uppers and "smart-uppers" looking to leverage the promise of Industry 4.0.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Georges Saad, Co-Founder, Spektrum, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Jeremy Frohlich, Marketing Specialist, LRDG Inc., Canada (Next Gen) <p>Standing Tall between Generations: The Indigenous Concept of 7 Generations Imagine yourself amidst six generations – parents, grandparents and great grandparents who have come before – and children, grandchildren, and great grandchildren, who have come after. We explore business longevity through the lens of shared responsibility and appreciating those who came before, and those who are yet to come.</p> <p><i>Led by:</i></p> <ul style="list-style-type: none"> • Jimmy Ung, Intercultural Consultant, Canada (Next Gen) <p><i>With:</i></p> <ul style="list-style-type: none"> • Antoine Mayaud, Association Familiale Mulliez, France 	<p>Les Labours</p> <p>Salle Fafard</p> <p>Salle Labbé</p> <p>Salle Fillion</p>

Time	Sunday 17 November	Location
9.00-9.30	<p>Plenary Tête-à-Tête - Migration</p> <p>The economic case for migration may seem obvious, but politics and societal attitudes (greater tribalism, rising polarization) stand in the way of accommodating more migrants. This is particularly obvious at the border between central and northern America.</p> <p><i>Introduced by:</i></p> <ul style="list-style-type: none"> • Ali Borhani, Managing Director, 3Sixty Strategic Advisors Ltd., UK <p><i>In conversation with:</i></p> <ul style="list-style-type: none"> • The Honourable Ratna Omidvar, Senator, Author of <i>Flight and Freedom</i>, Canada 	Salle Multi
9.30-10.45	<p>Interacting in Parallel</p> <p>Polarization, Migration and Transcending Borders</p> <p>When thousands of migrants fleeing poverty and persecution in Honduras, Guatemala and El Salvador recently turned up at the US-Mexico border, US President Donald Trump labelled the caravan “an invasion”. Pragmatists might have called it thousands of missed opportunities. Economic migration, standard policy in western nations, ensures continued growth of labor forces and economies. Yet Angela Merkel’s decision to allow more than a million migrants, mainly of Syrian origin, into Germany in 2015 raised more than a few eyebrows. We ask:</p> <ol style="list-style-type: none"> (1) Should Western nations reduce or increase immigration? (2) Do family businesses have a particular role to play in integrating migrants? (3) How best can Western nations address labor shortages through immigration? <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Ali Borhani, Managing Director, 3Sixty Strategic Advisors Ltd., UK <p><i>With:</i></p> <ul style="list-style-type: none"> • Rachel Kiddell-Monroe, Founder, SeeChange Initiative, Board of Directors, Médecins sans Frontières, Canada • Jean-Nicolas Beuze, Representative, UNHRC, Canada • The Honourable Ratna Omidvar, Senator, Author of <i>Flight and Freedom</i>, Canada • Ambreen Bhaloo, The Foray Group, Canada • Kai Xiong Zhang, Director of Business Development, Helisis, China (Next Gen) <p>ESG Family Business</p> <p>ESG (environmental, social and governance) strategies – set up to mitigate the colossal environmental and societal challenges that we collectively face – are being embraced by an increasing number of businesses and may soon become an imperative. If Millennials are as conscious of their social, economic and carbon footprints as they claim, how will they redress the failings of their short-sighted predecessors? We might witness impact investing, their probable financial legacy, morph into a broader mindset of “conscious” investing, where financiers are motivated by causes. But that requires pioneering leadership. We ask:</p> <ol style="list-style-type: none"> (1) Are families ahead of the curve or behind it? (2) How are family businesses positioned to address them? (3) Is “conscious” investing a fad? <p><i>Facilitated by:</i></p> <ul style="list-style-type: none"> • Anita Nowak, Academic Associate, Desautels Faculty of Management, McGill University, Canada <p><i>With:</i></p> <ul style="list-style-type: none"> • Nir Tsuk, Innovation and Intrapreneurship Professor, Practitioner, Israel • Ian Boeckh, President, Boeckh Foundation, Canada • Patricia Annino, Accredited Estate Planner (AEP), Partner, Rimon’s Trust and Estates Group, USA • Felix Giroux, Social Impact Strategy, CREDO, Canada (Next Gen) • Bhoomika Saxena, Co-Founder, Montreal Social Value Fund, Canada (Next Gen) 	Salle Multi
		Salle Fillion-Labbé



Families Summit of Minds

CHARLEVOIX, CANADA, 15-17 NOVEMBER 2019

Time	Sunday 17 November	Location
10.45-11.15	Stretch and Juice	Le Foyer
11.15-12.30	Concluding Plenary - Conscious Capitalism More and more business leaders and investors think that they ignore the common good at their peril and that the days of the incumbent form of capitalism are numbered. They make up a growing chorus calling for more inclusive, equitable and sustainable forms of capitalism. Is capitalism as we know it terminally ill? What form will the re-socialization and re-moralization of business take? Can we achieve a more sustainable form of capitalism? We recap our themes of geopolitics, technology, poverty and wealth, leadership, the environment, and put emphasis on how enterprising families might best navigate tomorrow's world. <i>Facilitated by:</i> • Thierry Malleret , Co-Founder, Monthly Barometer, France <i>With:</i> • Antoine Mayaud , Association Familiale Mulliez, France • Ido Aharoni , Ambassador, New York University, USA • Lina Dieudonné , Co-Founder and Associate, Montreal Social Value Fund, Canada (Next Gen) • O'Neil Agossa , 2018 Canada CEO of the Year Future Funds Award Recipient, Canada (Next Gen)	Salle Multi
12.30	Departing Buffet	Le Foyer
13.00	Bus Departure to the Québec Train Station and Airport	

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