



Wealth Management
Dominion Securities

Feel Good Friday

Reaching an educational milestone



In July 2020, I completed the Family Enterprise Advisor designation, which was offered by the Family Enterprise Xchange in partnership with the UBC Sauder School of Business. This program represents the culmination of years of research in the study of family business, taught by leaders in the field. Over eleven months, the program consisted of six learning modules focused on the integration of the business, family, and ownership systems, facilitation and communication, governance structures, continuity planning, and working within a multidisciplinary team to provide collaborative and complementary advice to business family clients.

I had the opportunity to get to know a great group of advisors from other disciplines, and complete a capstone project with a very successful enterprising family. Following the completion of the program there were two rigorous examinations; one written and one oral, to achieve the designation of Family Enterprise Advisor.

I am thrilled to have completed the program, which has allowed me to expand my understanding and bring new awareness to the complexities, unique opportunities, and challenges that enterprising families face. I am looking forward to offering a perspective focused on the family system as a whole, to bring thoughtful solutions in conjunction with other Family Enterprise Xchange member advisors, and ultimately help families achieve successful outcomes.

Warm regards,
Rossi

For more information visit: https://family-enterprise-xchange.com/resource/announcing-the-family-enterprise-advisor-designates-of-2020/?utm_source=globe_and_mail&utm_medium=banners&utm_campaign=feaprogram_globeandmail2020

