



March 11, 2016

To all members of CAFE and IFEA:

At our webinar on March 11, 2016, we outlined a new vision to transform the family enterprise experience in Canada for business families and their advisors.

Over the past 18 months, our two organizations – the **Canadian Association of Family Enterprise (CAFE)** and the **Institute of Family Enterprise Advisors (IFEA)** – carefully considered how best to meet our shared mandates to improve outcomes for Canadian business families. Based on feedback from our stakeholders across Canada we are extremely proud and excited to introduce:

THE FAMILY ENTERPRISE XCHANGE (FEX)

- Created to lead a major movement for Family Enterprises in Canada because they matter so much to the country's economic and social well-being
- Bringing together the best knowledge and globally recognized best practices in a safe environment for families, and delivering world-class education to advisors so they can support their family enterprise clients
- Being a voice that will be heard, and a movement that we will all want to be part of

The mandate of the Family Enterprise XChange will be to connect, support, inspire, educate and advocate for our family enterprise community, to lead in research and knowledge, and to curate and develop the best content in the field.

A SOUND FOUNDATION AND A SUSTAINABLE MODEL

FEX effectively unifies the membership communities, benefits, chapters and operations of CAFE and IFEA with funding support from the Family Enterprise XChange Foundation. As an entirely new organization, FEX will not only leverage the strengths of all 3 organizations, but bring a fresh perspective and vision to the field.

FEX is designed with a sustainable business model for the future that will ensure adequate funding for program growth and development. It has secured guarantees for the necessary seed capital to support the launch and first several years of operation until it is financially self-sustaining – including the investment in a multi-media marketing program to raise awareness and interest in FEX, the Family Enterprise Advisor (FEA) designation, and the importance of family enterprise to the community.

FEX LAUNCH – NOVEMBER 1, 2016

Our plan is to roll out FEX with roadshows and a promotional campaign in early fall, followed by a full launch on November 1, 2016. More details about this process, your membership opportunities, and how you can join our movement will be shared at the CAFE Symposium in May and through ongoing communications and updates in the coming months. For now it is business as usual at CAFE and IFEA.

Come on board and be part of a fast-growing and engaged membership of like-minded enterprising families and advisors, and together we'll form an effective community working to improve outcomes for Canadian business families. We invite you to [read our FAQ](#) and share your questions and feedback about this ground-breaking initiative in Canada with our Board and staff members by emailing info@ifea.ca or info@cafecanada.ca.

Margaret-Jean Mannix
Chair of IFEA

Allen S. Taylor
Chair of CAFE

