

CPA Ontario Symposium on Accounting and Governance Issues in Family Owned Businesses

Financial and Emotional Considerations in Family Business Succession

Date: May 9, 2019 from 1:30 to 4:30 pm

**(Desmarais building – 55 Laurier East
DMS4101 Camille Villeneuve Room)**

Start Time	End Time	Description	Location
Thursday May 9th, 2019			
1:30 pm	1:45 pm	Registration and Networking	DMS4101 (Camille Villeneuve Room)
1:45 pm	2:00 pm	Welcome and Opening Remarks <ul style="list-style-type: none"> • Walid Ben-Amar, Executive Director, CPA Accounting and Governance Research Centre. • François Julien, Dean, Telfer School of Management. • Richard MacNeill, Ottawa CPA Ontario Association. 	DMS4101 (Camille Villeneuve Room)
2:00 pm	2:15 pm	Peter Jaskiewicz , Professor and University Research Chair in Enduring Entrepreneurship, Telfer School of Management. <i>Presentation of the Case 'For Money or Love? Financial and Socioemotional Considerations in Family Firm Succession'</i>	DMS4101
2:15 pm	2:30 pm	Dave Clarke , CPA, CA, Partner, Baker Tilly Ottawa Valuation issues	DMS4101
2:30 pm	2:45 pm	Pamela L. Cross , Partner, Borden Ladner Gervais, LLP Legal Issues	DMS4101
2:45 pm	3:00pm	Q&A Period	DMS4101
3:00 pm	3:15 pm	Coffee Break and Networking	DMS4101
3:15 pm	3:30 pm	Jim McConnery , CPA, CA, Partner Welch LLP Tax Planning Issues	DMS4101
3:30 pm	3:45 pm	Simon Couvrette , CPA, CA, Director Wealth Planning at BMO Wealth Management Wealth management issues	DMS4101

3:45 pm	4:00 pm	Peter Jaskiewicz , Professor and University Research Chair in Enduring Entrepreneurship, Telfer School of Management Emotional considerations and epilogue	DMS4101
4:00 pm	4:30 pm	Q&A Period	DMS4101
5:00 pm	7:00 pm	Opening Reception to the Telfer Annual Conference on Accounting and Finance	Alex Trebek Alumni Hall