

Conway Centre For Family Business Columbus, Ohio	Atlantic Family Bus Association	Centre for Family Business Waterloo ON	VI FBA	Family Enterprise Canada
\$385US less than 10 staff \$560US less than 75 \$560US 76 empl+ Advisors \$4500.00 a year	\$500. Unlimited incl. for Advisors	\$1400. \$1500. For Advisors	\$699 Unlimited for Family; 7 members for Advisors	\$1995 - foundation \$5K- premium
Value Proposition	Value Proposition	Value Proposition	Value Proposition	Value Proposition
<p>Free admittance for all members of your family business to nine educational programs each year.</p> <p>Eligibility to participate in Peer Groups. (FBATs)</p> <p>Ability to interact on a regular basis with other members of family-owned businesses/ and advisors</p> <p>Subscription to semi-annual print newsletter -Family Business Communicator.</p> <p>Opportunity to invite guests to programs in order to introduce them to the Center.</p> <p>Invitation to attend, at no cost</p> <p>Annual Family Business Tour and Networking Event.</p> <p>An invitation to attend our Annual Family Awards Program and Expo.</p> <p>Opportunity to participate in Annual Golf Open</p> <p>Access to professionals experienced in working with family businesses.</p>	<p>FBATs</p> <p>Funding of FBATs to \$1K for their own training</p> <p>Memorial Scholarship for \$3K for children, grandchildren/nieces, nephews of Family Owned Bus members</p> <p>Webinars/events</p> <p>Revenue sources include the annual Peter Miller dinner (started with a \$10K gift from Miller family) and sponsorships. 60K of sponsorships for annual dinner</p> <p>Also misnamed as it is predominantly Nova Scotia</p> <p>Full time ED at \$80K plus admin plus events/social media</p> <p>Registered as Not for Profit</p>	<p>8 breakfast for 2 tickets; other events</p> <p>FBAT type groups</p> <p>Advisors must have experience with family businesses</p> <p>Must attend at least one breakfast event annually and bring a non-member family-owned business</p> <p>Advisors FBATs</p> <p>55 members</p> <p>ED is new and part-time but has admin staff</p> <p>Do awards</p>	<p>FBATs – no funding</p> <p>Events</p> <p>Newsletters</p> <p>65 paid memberships (40%)</p> <p>160 members on mailing list</p> <p>Bylaws state that Advisors must market FBA</p> <p>No more than 1/3 Advisors of total membership</p> <p>Advisors cannot be charged less than member fees</p> <p>Registered as a Society</p>	<p>FBAT type groups; access to resources and coaching</p> <p>No advisors in FBATs</p> <p>Advisors who join must have completed their FEA certification @ \$16K</p> <p>FEA members pay \$1495.</p> <p>Next Gen National Group</p> <p>Premium is concierge type services members to move onto tier 2</p> <p>Events/webinars/resources</p> <p>Annual symposium</p> <p>Family Summit of Minds- no advisors @\$1595.</p> <p>Awards to non-members receive a free membership</p> <p>Piloted and launching a mentoring program that has a matching process @ \$2K per mentee</p> <p>300 family members</p> <p>Regular family tours with cocktails</p>

Summary and overview of findings:

All associations are struggling somewhat to increase membership. All Associations host events but in general want fewer but higher quality. Enterprise Canada gives a free membership to award winners. We do not.

We don't do any family tours.

At VI FBA, most of the Advisor community is from the financial and wealth management sector. Some lawyers but few compared to financial services. Ironically, there are no psychologists or counsellors who specialize in family business despite the fact that most family-owned companies include this expertise to help them navigate family issues.

When you review this overview, take a few minutes to jot down your insights and observations. What stands out for you?
