

Family Business Cohort

Experiential learning to build better business judgment

Empowering Next-Generation Leadership in Atlantic Family Enterprise

Designed specifically for rising shareholders and emerging leaders in Atlantic Canada's family enterprises, this two-year cohort experience provides the practical tools, financial acumen, and strategic clarity needed to transition seamlessly from successor to steward. Across 12 immersive retreats, participants dive deep into critical family business disciplines—from establishing robust governance structures, business valuations, and technology adoption to navigating multi-generational transition, conflict resolution, and personal resilience. Programs are designed with peer collaboration with insights from experst who have lived the transition, and navigate economy of Atlantic Canada.

Is This You?

- Value open, transparent communication
  Leaders willing to be vulnerable about operational bottlenecks, leadership doubts, and family friction.
- Prioritize long-term stewardship over short-term wins
  Successors committed to building sustainable value for the next generation of shareholders.
- Embrace proactive leadership development
  Individuals actively preparing themselves to lead with credibility, financial fluency, and emotional intelligence.
- Are invested in each other's journeys
  Participants are expected to show up prepared to listen, challenge constructively, and celebrate each milestone together.

Wallace McCain INSTITUTE FOR BUSINESS LEADERSHIP

What our alumni say...

The Family Business program has been an incredibly valuable experience, both personally and professionally. Being part of a family business comes with unique challenges that can be difficult to navigate, and having a network of people who truly understand those dynamics has been invaluable. The cohort has given me the opportunity to learn from others, gain new perspectives, and grow as a leader while building a stronger foundation for the future of our business. I would highly recommend the program to anyone navigating their own journey in a family business.

Scott Beamish
Deep Roots Distillery
Prince Edward Island

The part of the Family Businesss program that's impacted me most is really the relationships that you build with these people that are in a very similar situation to you... that network of trust that's been really impactful to me.

Emily Corey
Corey Nutrition
New Brunswick

For further information on this and other WMI programming please visit: www.wallacemccaininstitute.com

What You Can Expect at Each Session

The program includes twelve total sessions, six per year. Each session that are two days each (except for the first and last which are three days long). Sessions are designed to include 25% external content from speakers, and 75% from group participation. Each session usually follows this schedule.

DAY 1

9 - 12	Goal Review & Forum Updates
12 - 1	Lunch
1 - 4	Workshop
4 - 6	Health Break
6 - 7	Break & Dinner
7 - 8:30	Fireside Chat with Guest Speaker

DAY 2

9 - 12	Deep Dives
12 - 1	Lunch
1 - 3	Deep Dives
3 - 5	Peer Coaching & Goals Setting

Guiding Topics & Schedule

The following are the dates of the program for the full two year. The program will run Monday-Tuesday.
Participants are highly encouraged to arrive Sunday evening, and accommodations are included in Tuition Cost.

2027

JAN 24-27	**Open Communication**
MAR 21-23	**Fair vs Equal** **The responsible future shareholder**
MAY 9-11	**Family Governance** **Decision Making**
AUG 22-24	**Managing Transition**
OCT 24-26	**Cash Management**
DEC 12-14	**Business Valuation**

2028

JAN 23-25	**The Advisory Team**
MAR 19-21	**Marketing & Communications**
MAY 7-9	**Economic Shift & Rapid Technology Adoption**
AUG 20-22	**HR: Recruitment, Retention Practices**
OCT 15-17	**Influence: Managing the team**
DEC 10-12	**Mental Health:** **Managing your capacity** **Graduation**

LOCATION & COST

The sessions will all be held at retreats where the group will have exclusive use of the facility. All meals and meetings will occur onsite. The location rotates around all Atlantic Provinces, primarily New Brunswick, Nova Scotia and Prince Edward Island.

he cost for each participant is only $8500+HST per year.

HAVE QUESTIONS?

Email info@wallacemccaininstitute.com or go through our online directory of alumni and contact someone you know to get first hand accounts of their experience in the program.

APPLICATION PROCESS

Before applying, review the website, especially the videos, and talk to alumni. Applications are due November 25th 2026

https://wallacemccaininstitute.com/apply-form/

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