

Planning For Life After The Close

Moderator



Chris Reichert

President,
Reichert Family Enterprise Advisors



Mike Baker

Principal & Portfolio Manager,
Leith Wheeler Investment Counsel



Denise Castonguay

Founder,
Canada Gives



Barb Kleysen

Family Council Member,
T2K Enterprises Inc.



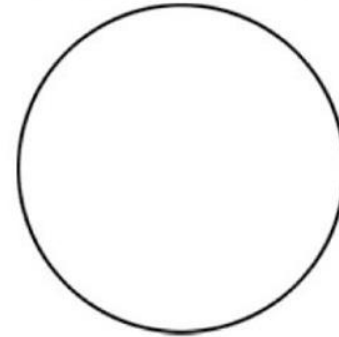
Tom Kleysen

Principal,
T2K Enterprises Inc.

Most enterprising families keep their story private.



Circle of trust





THE GLOBE AND MAIL**2006**

Mullen adds Kleysen trucking company to assets

BRENT JANG >

PUBLISHED APRIL 7, 2006

This article was published more than 18 years ago. Some information may no longer be current.

[COMMENTS](#) [SHARE](#) [GIVE THIS ARTICLE](#)

Mullen Group Income Fund is buying the Kleysen family's venerable transport company. Calgary-based Mullen didn't disclose how much it will pay for **Kleysen Investments Ltd.**, but the Winnipeg-based firm had revenue last year of \$100-million. Kleysen is the latest purchase for Mullen. The trucking trust signed a deal in February to take over Producers Oilfield Services Inc. for \$900-million. The Kleysen

Tom and Barb will share a glimpse of the new chapters they've been writing together with Stephen and Shannon after the sale of Kleysen Group.





Mike Baker

Principal & Portfolio Manager,
Leith Wheeler Investment Counsel

- Portfolio Structuring and Investment Management
- Capital deployment after liquidity event
- Managing risk
- Considerations when searching for right investment manager



Denise Castonguay

Founder,
Canada Gives

- Philanthropic goals and impactful giving
- Strategies that enable entrepreneurs to give back in ways that align with values
- Donor Advised Funds and the rising generation
- Examples of what other families are doing



Tom Kleysen

Principal,
T2K Enterprises Inc.



Topics for Exploration:

- Personal identity?
- Finding purpose beyond the business?
- How to spend your time post-sale?

Kleysen Family Values Statement

We value **FAMILY**

- We will always love, care and be there for one another.
- We will communicate openly and effectively with each other and take active steps to ensure a strong sense of belonging is fostered.

We value **INTEGRITY**

- Integrity builds trust, which comes from being reliable and consistently delivering quality work.
- We play to win, but do not strive to succeed at the expense of others.
- We stay true to who we are even when our backs are against the wall.
- We will always choose the best method to complete our work, not the easiest. Work smarter, not harder.
- We do the right thing without the need for public recognition or validation of others.

We value **TRUST**

- We believe trust is a solid foundation upon which relationships and confidence are built.
- We feel secure knowing we will always have one another's backs.

We value **LOYALTY**

- Loyalty is built through repeated trust.
- We embody 'stick-to-it-iveness'; we follow through on commitments and finish things we start, while also recognizing when it is best to adjust course or step back from projects that no longer align with our long-term goals.

We value **AMBITION**

- We are an action-oriented team that is engaged in all areas of life.
- We believe that success is earned, not given.
- People may know our last name, but our reputations are earned with our first names.
- We are proud of our family's history and know our future(s) will be defined by the ambition we have as individuals.
- Success is not all about money; we will support one another to succeed in our chosen fields.

We value **HEALTH**

- We believe that being healthy is more than just physical wellbeing.
- We strive to be healthy mentally, spiritually, intellectually, socially, and emotionally.

Excerpt from Kleysen Family Values Statement

We value **AMBITION**

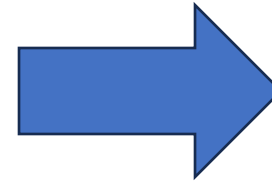
'People may know our last name,
but our reputations are earned with our first names.'

'We are proud of our family's history and know our future(s) will be defined by
the ambition we have as individuals.'

THE GLOBE AND MAIL*

2006

Mullen adds Kleysen trucking
company to assets



 T2K
Enterprises Inc.

 McGillivray
Business Park

 Fairway
divorce solutions

 QUIK-THERM™

Innovative Insulation Solutions

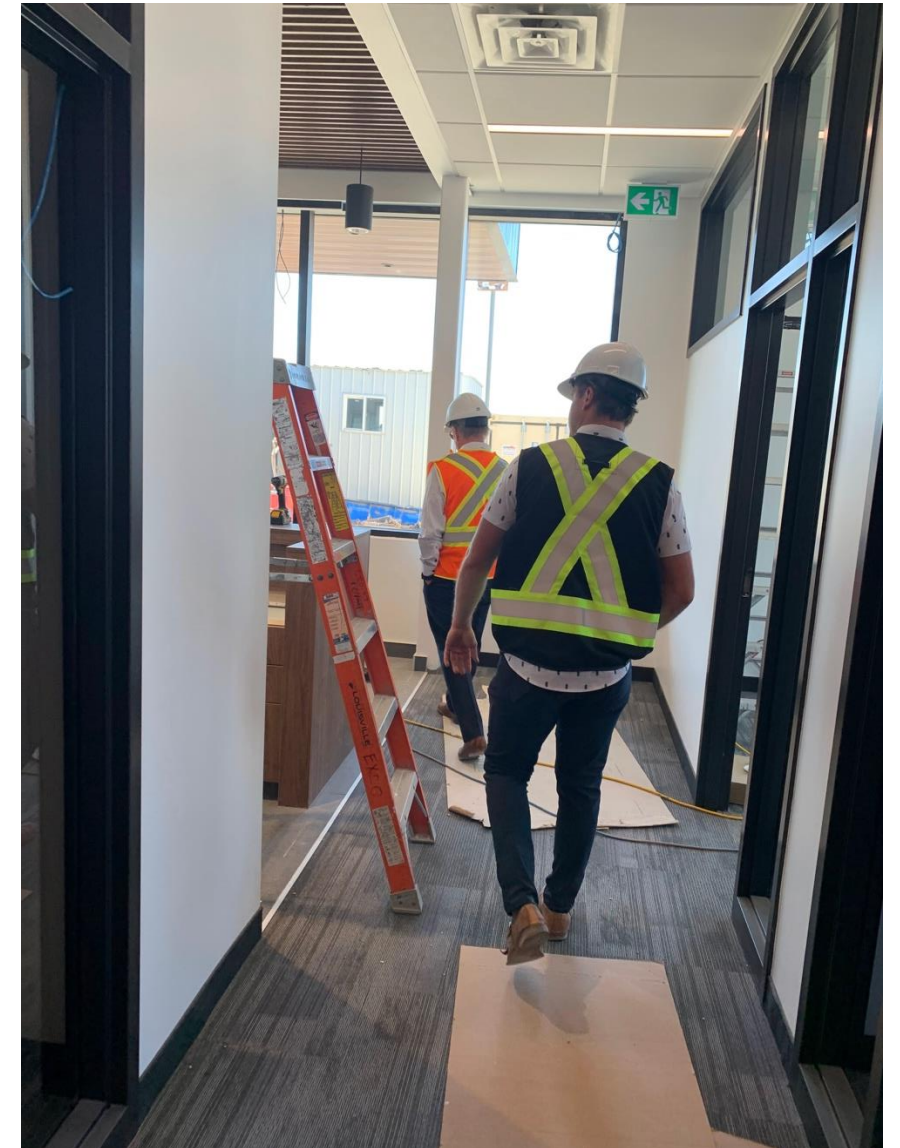


T2K
Enterprises Inc.

Municipality of
Macdonald

103

quik-thorn.com







**MY SECOND
GARAGE**

CUSTOMIZED PREMIUM STORAGE



**MY SECOND
GARAGE**





MY SECOND
— GARAGE —

CUSTOMIZED PREMIUM STORAGE

21









Barb Kleysen

Family Council Member,
T2K Enterprises Inc.

Harmony

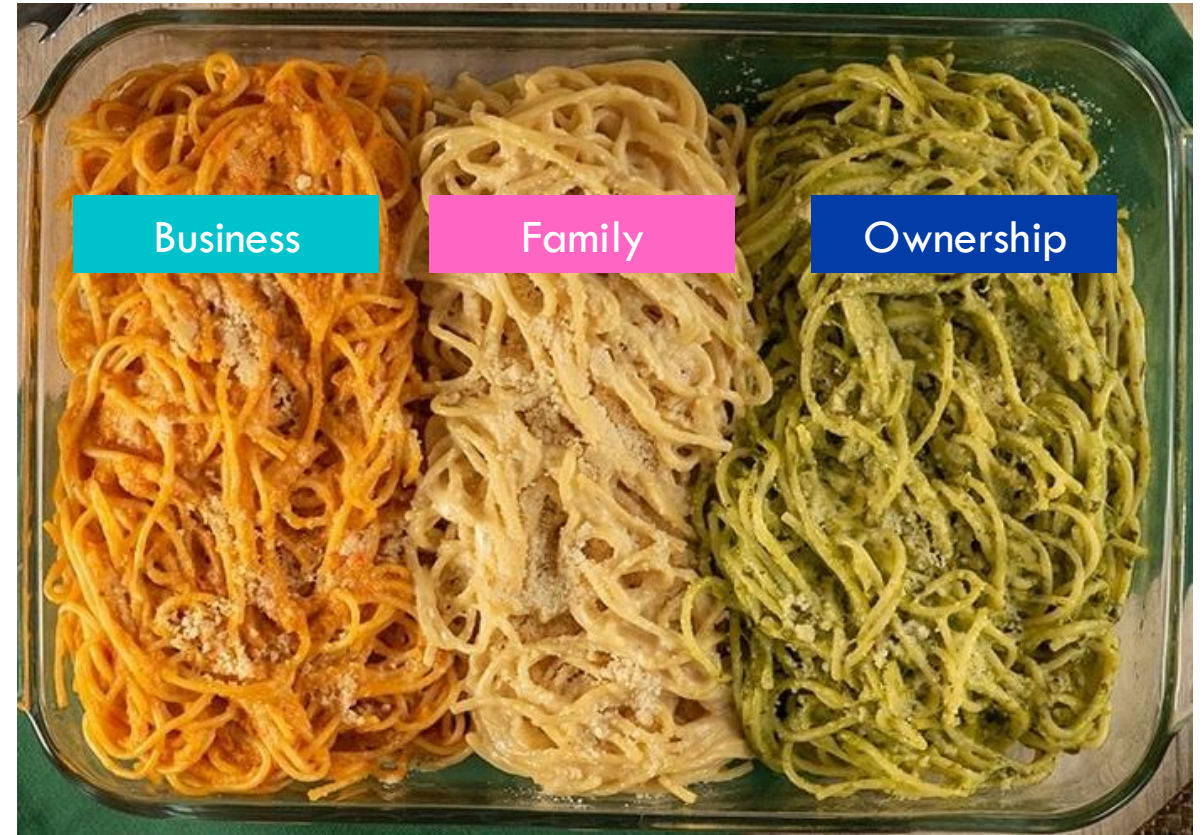
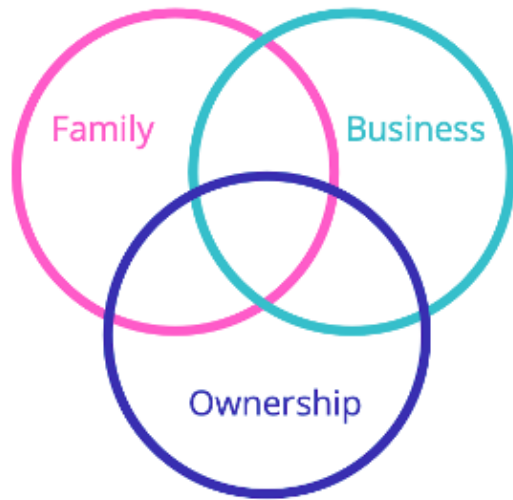


Topics for Exploration:

- Navigating discussions with rising generation post-sale? (How open/transparent to be?)
- What role does communication and governance play re: functioning of the business and cohesiveness of family relationships?

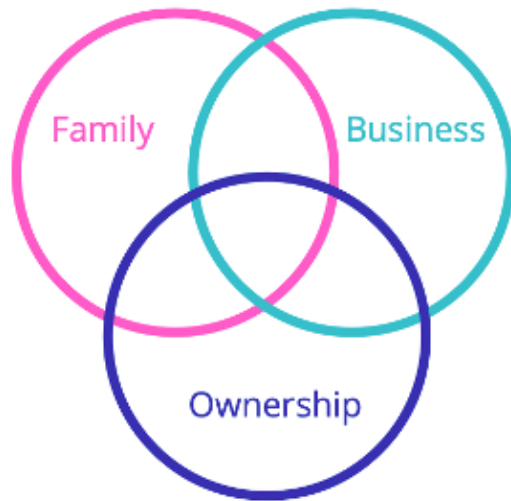
3 Inder-dependent Systems

(issues in 1 system quickly affect the other 2)



3 Inder-dependent Systems

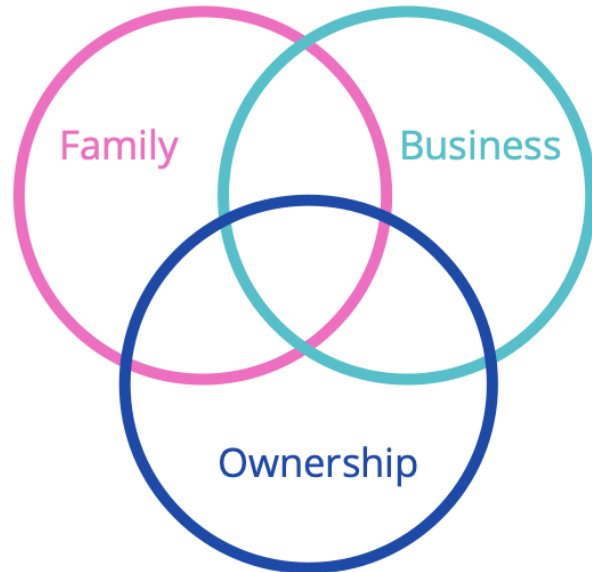
(issues in 1 system quickly affect the other 2)



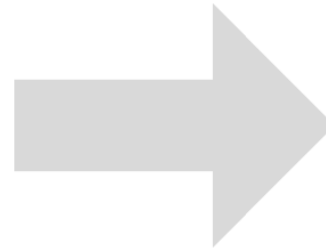
3-CIRCLE MODEL (WITH GOVERNANCE STRUCTURES)

Process: Family Council
Doc: Family Constitution

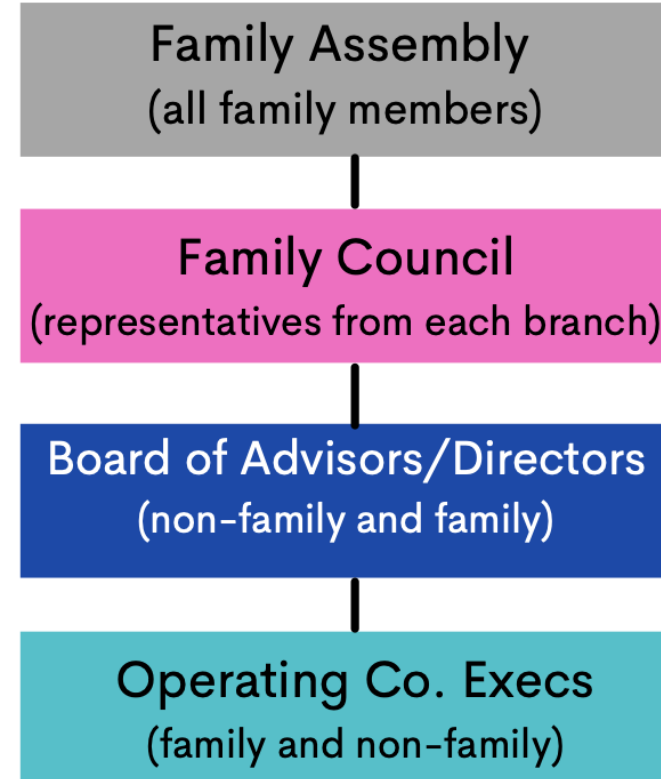
Process: Board of Advisors/Directors
Doc: Strategic Plan



Process: Shareholders Meetings
Doc: Unanimous Shareholders Agreement



MATURE GOVERNANCE MODEL



Excerpts from Kleysen Family Values Statement

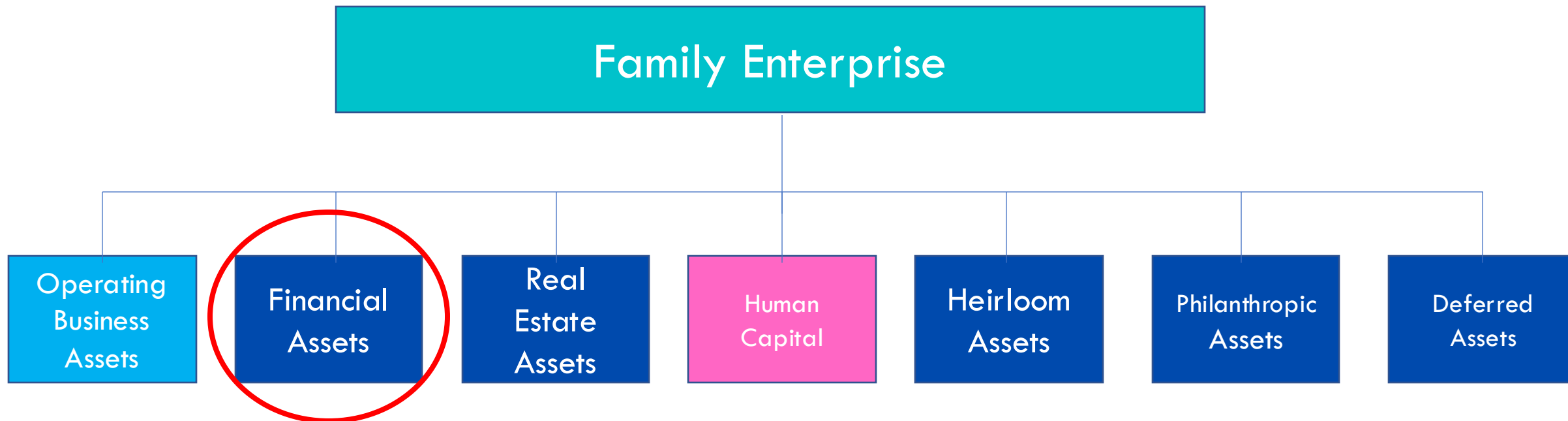
We value **FAMILY**

We will always love, care, and be there for one another.

We feel secure knowing we have each others' backs.

We value **INTEGRITY**

We do the right thing without the need for public recognition or validation from others.

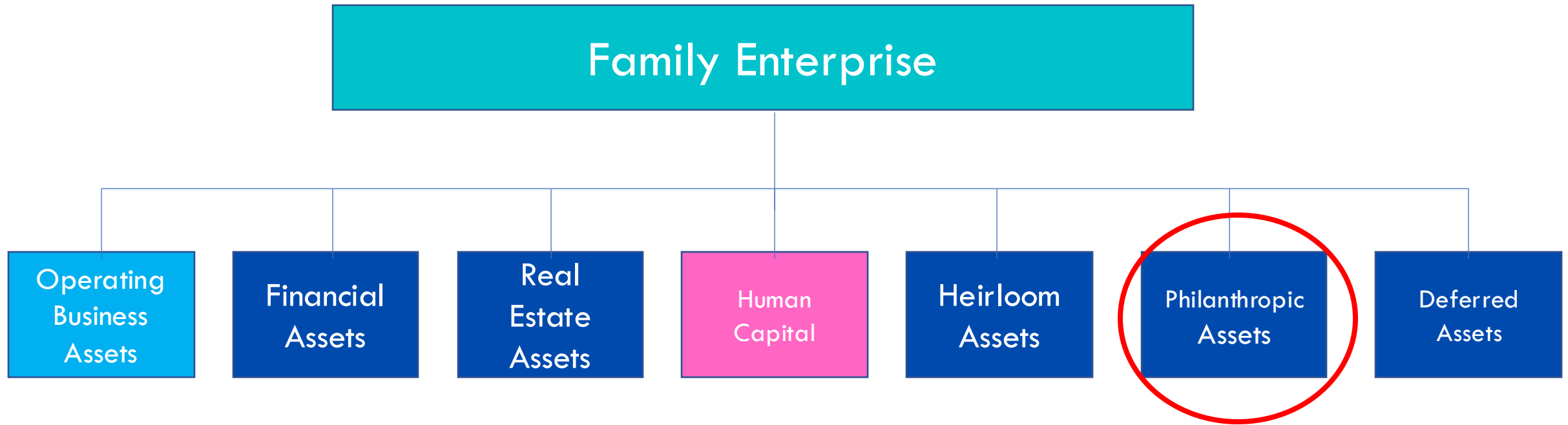




Mike Baker

Principal & Portfolio Manager,
Leith Wheeler Investment Counsel

- Portfolio Structuring and Investment Management
- Capital deployment after liquidity event
- Managing risk
- Considerations when searching for right investment manager





Denise Castonguay

Founder,
Canada Gives

- Philanthropic goals and impactful giving
- Strategies that enable entrepreneurs to give back in ways that align with values
- Donor Advised Funds and the rising generation
- Examples of what other families are doing

Session Wrap Up

- Personal identity and finding purpose
- Discussing \$ with rising gen
- Family Governance and Stewardship

- Portfolio construction, capital deployment
- Selecting an investment counselor
- Philanthropic strategies – impactful giving
- Donor Advised Funds - with rising gen




Thank you for your
attention.

Questions are most
welcome.

Planning For Life After The Close

Moderator

**Chris Reichert**
President,
Reichert Family Enterprise Advisors

**Mike Baker**
Principal & Portfolio Manager,
Leith Wheeler Investment Counsel

**Denise Castonguay**
Founder,
Canada Gives

**Barb Kleysen**
Family Council Member,
T2K Enterprises Inc.

**Tom Kleysen**
Principal,
T2K Enterprises Inc.