



MacKay
CEO Forums

MACKAY CEO FORUMS

Accelerating CEO Performance through the highest impact and least time-intensive peer group for forward-thinking and action-oriented CEOs and Top Executives across Canada. Our dream is to populate the world with inspiring leaders.



ACCELERATING CEO RESULTS: The Challenge

The work only gets tougher when you reach the top. The time demands on CEOs are harsh and the job is often isolating. The pace, complexity and constant challenges are a heavy weight to carry. Not surprisingly, the average tenure of today's CEO is just over 3 years.

SO HOW DO INSPIRING LEADERS DO IT?

Inspiring leaders surround themselves with successful peers. We bring results-oriented CEOs, executives and business owners together to solve their toughest problems and maximize their best opportunities through peer learning and support.

Use your MacKay CEO Forums peer group to:

- Help you master your time
- Connect with other successful CEOs
- Get agenda-free, confidential, peer feedback
- Put top minds to work on your most pressing issues
- Leverage best practices and experience to accomplish objectives faster
- Lift weight off your shoulders and gain space to focus on the big picture
- Be inspired, motivated and held accountable by your peers and Forum Chair
- Get access to the best "trusted advisors" for CEOs through our Forum Chair community across Canada



Results-oriented, professionally led peer learning groups for CEOs and Top Executives – many of whom are award winning and leading brands

CEO PROGRAM STRUCTURE

- 14 carefully-matched, high achieving CEOs/ Executives/Business Owners per group – companies must have annual revenues between \$5MM–\$5Billion
- Each group led by a professional Forum Chair who is an accomplished “trusted advisor” to CEOs
- 90-day Virtual groups meet monthly for 4hrs for the first 90-days and then transition to our full-year program (see next item)
- Full-year groups meet seven times/year: six day-long meetings + an annual two-day retreat (in-person subject to COVID-19 protocols)
- Annual dinner with spouses/significant others (in-person subject to COVID-19 protocols)
- Each meeting includes a guest presentation from a subject-matter expert and dedicated time for peer input on your most pressing issue
- A results-oriented, high performance and high accountability peer learning experience using our “shared experience” and judgement-free approach

ADDITIONAL MEMBERSHIP BENEFITS

- Complimentary invitations to our ongoing series of 1-hour EDGE Leadership Events and annual EDGE Experience events (virtual)
- Exclusive access to and inclusion in our membership portal of 1,200+ members across Canada
- Four hours of one-on-one time/year with Forum Chair for goal-setting and confidential support/ advice
- Member-only pricing (\$400 savings) and preferred seating for our annual 1-day EDGE Summit (when we return to in-person events)
- Thought leadership from our Platinum, National and Innovator Partners to help you navigate through this incredibly disruptive global situation
- Preferred pricing and thought leadership from our Platinum, National and Innovator Partners

EXECUTIVE PROGRAM STRUCTURE CEO program structure plus:

- For direct reports of CEOs/Business Owners of \$5MM–\$5Billion+ companies
- Executive groups are cross-functional (e.g. CFO, COO, VP HR...)
- CEO members receive priority access to executive forums for their executive team members

SMALL BUSINESS GROUPS (SBGs)

- Each group led by a professional Forum Chair who is an accomplished “trusted advisor” to CEOs/Business Owners
- Groups meet six times/year: six day-long meetings
- Receive all the same additional benefits as our CEO and Executive program members
- Members have the opportunity to “graduate” to CEO and Executive Forums when they grow

CRITERIA TO JOIN

- \$250,000–\$5,000,000 in revenue
- at least two years in business

THE MACKAY WAY

HIGHER IMPACT FOR LESS TIME FORMAT

Provides the highest impact, least time-intensive peer learning opportunity in Canada

- 90-Day Virtual groups meet monthly for 4 hours for the first 90-days and then transition to our full-year program (see descriptions below)
- Full-year groups meet only once every two months (virtually or in-person, subject to COVID-19 protocols)
- Peer group members have high accountability and are forward-thinking, action-oriented
- All meetings have a structured agenda with high impact speakers and judgement-free format using our shared experience leadership tool



PROFESSIONAL FACILITATION

Delivers better forum outcomes, optimizing value for time invested

- Our Forum Chairs are all highly skilled, trusted, professional CEO advisors

OUTSTANDING MEMBERS

Help you achieve your full potential and master your time

- Our members are accomplished CEOs with a drive for continuous development
- We have the most award winning and leading brands in our peer groups

BEST FIT, DIVERSE PEER GROUPS

Maximize relevance and learning

- Our carefully constructed groups consider business size, scope and ownership model, as well as individual career stage and future business plans
- We have over 30% female membership, the highest in our industry

PARTIAL MEMBER LIST

A&W Food Services of
Canada
All Weather Windows
BDC
Bison Transport
CANA Group of Companies
Coast Capital Savings
Connect First Credit Union
Copeman
Driving Force
DynaLifeDX
EncoreFx

Fresh Direct Produce
Houle Electric
Integral Energy Systems
KUBRA
Lakeside Process Controls
Long View Systems
Medical Pharmacies Group
Mike & Mike's Organics
Modu-Loc Fence Rentals
Mr. Lube Canada
Nicola Wealth Management
Odlum Brown

Omicron
Paladin Security
Pharmasave Drugs
Red Sun Farms
Sirius XM Canada
Sleep Country Canada
The Oppenheimer Group
Trailer Wizards
Trotman Auto Group
TU Group
Upside Engineering
Wakefield Canada

WHAT OUR MEMBERS SAY

“ We’ve taken advantage of MacKay Executive Forums in addition to the CEO groups. This has given us a common language and tools toward the transformation of our culture, business model, and valuation.



LAURIE SCHULTZ
PRESIDENT & CEO, ACL

“ I found out about MacKay CEO Forums through one of my 50 Best Managed CEO colleagues. Accessing their experiences has been a very valuable investment of my time.



JOHN ANDERSON
CHAIRMAN, PRESIDENT & CEO,
THE OPPENHEIMER GROUP

“ Nowhere else can I get such honest, direct, agenda-free input.



GEORGE MELVILLE
FORMER CHAIRMAN & OWNER,
BOSTON PIZZA INTERNATIONAL INC.

“ The MacKay CEO Forum provides an environment where challenges can be discussed and peer CEOs provide shared experiences, insights and lessons learned, a valuable tool for me as a business founder, owner and CEO.



LEE MCDONALD,
PRESIDENT & CEO, SOUTHMEDIC INC.

“ MacKay CEO Forums has been a great source of shared experience from my peers in the business community. The education topics and coaching expertise are also very valuable benefits of the program.



DEBRA HEWSON
PRESIDENT & CEO, ODLUM BROWN

“ I find being able to share my toughest business issues and challenges with other very successful CEOs to be a great investment of my time.



BOB MACDONALD
CHAIRMAN & CEO, WAKEFIELD CANADA

“ If you’re alone at the top, you’re doing it wrong.



JAY-ANN GILFOY
CEO, VANCITY COMMUNITY INVESTMENT BANK

“ The diversity of the group, quality of experience exchange, speaker punch, professional orchestration and confidentiality all work together beautifully.



STUART SULS
PRESIDENT & CEO, MR. LUBE

Time-strapped and capacity-constrained?

This is the time to join a best-fit CEO peer group.

As a member, we are committed to helping you master your time. Here's how you will benefit:

| | |
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| New CEO | <ul style="list-style-type: none">• Build your network while avoiding rookie mistakes that will get you fired |
| New Company Appointment | <ul style="list-style-type: none">• Maximize success in the first 90 days• Build a top talent team• Set the vision & strategy |
| Experienced & Settled | <ul style="list-style-type: none">• Accelerate growth• Lead a cultural shift• Get unstuck; prevent complacency• Build your CEO brand• Get unbiased buy/sell and financing experience• Cultivate innovation, customer loyalty, strategic focus, an accountability culture... |
| Industry Turbulence or Company Instability | <ul style="list-style-type: none">• Ensure well-being when leading under intense pressure• Tip the balance so your company comes out on top• Accelerate change• Build competitive advantage |
| Ownership Challenged | <ul style="list-style-type: none">• Navigate ownership dynamic & wealth transfer challenges of family enterprises• Deal effectively with difficult board situations• Manage diverse stakeholder interests• Avoid acquisition and integration pitfalls• Tackle Co-CEO and partnership challenges |
| Late Career CEO | <ul style="list-style-type: none">• Create a legacy• Build a succession plan |



Nancy MacKay CEO & Founder

To explore a best fit CEO peer group,
please contact Nancy MacKay

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WEB mackayceoforums.com

PARTNER offers to our MacKay CEO Forums Community

Our Platinum, National, and Innovator partners are all MacKay CEO Forums Members who are leaders in their industries. They provide thought leadership and preferred pricing exclusive to our Member Community.



MACKAY CEO FORUMS

MACKAY CEO FORUMS for any new member to MacKay CEO Forums who joins from Feb 1-Mar 31 2021, we are offering complimentary 1-year EDGE memberships (2K annual fee) to each of your Leadership Team members. All EDGE members must meet the criteria for membership.

[Contact for More Information](#)

PLATINUM PARTNER OFFERS



ROYAL BANK OF CANADA

For any new clients to RBC Wealth Management, Private Banking, we will provide the first six months of our monthly management fee on a complimentary basis for the Basic Private Banking package with a full-service guarantee.

[Contact for More Information](#)



SKLAR WILTON & Associates

For \$50M+ companies, a complimentary 1-hour zoom workshop with your key decision-maker and their marketing/executive team to help overcome uncertainty and prepare for the 'next normal'. We'll share our fact-based understanding of changing human behaviour and discuss ways to future-proof your business. Offered to the first 10 Members or their referrals.

[Contact for More Information](#)



YELLOW POINT EQUITY PARTNERS

Anyone who provides us with a new business acquisition opportunity and we complete that acquisition, Yellow Point will give \$50,000 for a platform acquisition and \$20,000 for an add-on acquisition by one of our portfolio companies. The opportunity must be non-auctioned and not already identified by Yellow Point.

[Contact for More Information](#)

NATIONAL PARTNER OFFERS



TELUS HEALTH CARE CENTRES TBC

[Contact for More Information](#)



McDERMOTT + BULL

M+B has created a complementary offering for MacKay members seeking consultation on the set-up of an executive-level search or succession strategy. The 60 minute consultation includes the sharing of best-practices and advice on three key elements: establishing vision and creating stakeholder alignment, marketing and branding strategy, and industry insights and candidate benchmarking.

[Contact for More Information](#)



NICOLA WEALTH

20% discount on a custom financial review - the entire fee will be waived should the member become a Nicola client
Complimentary 2nd opinion on your planning and investment diversification.

[Contact for More Information](#)



PROSERVEIT

Complimentary Secure Score Assessment - a graded score based on your technology, typically 1 day assessment
Complimentary IT Roadmap / Spend Analysis Call to help clients look for costs savings opportunities. (expected to save >10% of their current IT spend, we often recommend re-investing this in either security or innovation) the result will provide 5-10 recommendations on how they can reduce IT Spend and improve their business with technology. And 10% discount for any new customer's first purchase

[Contact for More Information](#)

For further information about any of these offers, contact
Eric Ng, Marketing + Chair Partnerships Coordinator
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MacKay CEO Forums |
www.mackayceoforums.com

PARTNER offers to our MacKay CEO Forums Community

INNOVATOR PARTNER OFFERS



ADVICA HEALTH

70% price reduction (incl family + dependent access) for an annual Advica Health Membership plan.

Option 1: Base Plan, which includes: 24/7 Virtual Health Access, Nurse Navigation and Concierge, Mental Health Navigator, Virtual Second Opinion for \$25/mo

Option 2: Gold plan which includes: all of the above plus annual blood and urine testing, Annual intake call with Navigation team, US based price + clinic navigation support for \$99/mo

[Contact for More Information](#)



BDC

A complimentary executive discovery session where your ambition meets our know-how. Learn more about how BDC Advisory partners with high growth private companies to scale their businesses via our MacKay CEO Forums Podcast or on BDC's website

[Contact for More Information](#)



BUSCH SYSTEMS

TBC

[Contact for More Information](#)



BOXAV

10% off all BoxAV bundles and complimentary Video Conferencing Training 101 training for your staff / exec teams (up to 500 people at a time).

[Contact for More Information](#)



CORPORATE TRAVELLER (Flight Centre Travel Group)

In addition to a complimentary travel program consult, in an effort to assist commercially, we will extend a 1% net rebate on total travel spend to any new partner for a limited time. Flexible payment terms of accrued funds. I.e: They can be forwarded to a charity of their choice, used for an internal program or to create a travel prize for a raffle. Conditions will apply.

[Contact for More Information](#)



EMPRESARIO CAPITAL PARTNERS

tbc

[Contact for More Information](#)



OPPY

Availability of award winning fresh produce items in case lots for a school fundraiser or charity event of your choice. Just nominate your cause and attendance numbers and Oppy will look to assist with supplies from our Vancouver warehouse, value up to \$500.

[Contact for More Information](#)



REAL TIME NETWORKS INC.

10% discount for any new customer's first purchase of Real Time Networks' Physical Security & Safety Solutions for key, assets, and people.

[Contact for More Information](#)



SIGNNOW

TBC

[Contact for More Information](#)



VANCITY COMMUNITY INVESTMENT BANK

TBC

[Contact for More Information](#)

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