



BUSINESS OWNER PLANNING SEMINAR 2026

05 NOVEMBER | 2:30 PM | LANGLEY



COVENANT[®]
FAMILY WEALTH ADVISORS

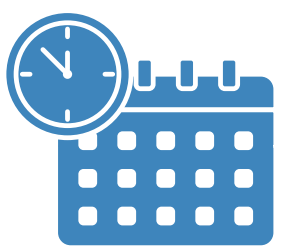


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Running a successful business requires vision, hard work, and resilience. But as a business grows, so do the decisions around family, tax, estate planning, and the future of what you've built.

That's why Covenant Family Wealth Advisors is bringing together experienced professionals to explore some of the key planning issues business owners face. We'll look at strengthening family relationships, when a corporate trustee may be the right fit, smart compensation and tax strategies, and how the right business structure can support both your family and your long term plans.

Whether you're thinking about succession, reviewing your estate, or simply looking to make sure the right pieces are in place, this seminar is designed to give you practical insight, greater clarity, and confidence for the future.



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21025 48 Avenue, Langley BC





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SPEAKERS



Mark Brandsma

Covenant Family
Wealth Advisors

BBA (Hons), CFP

Partner at Covenant, Mark specializes in financial and estate planning, helping families create thoughtful plans to preserve wealth and prepare for the future. He began his financial planning career in 1997 and joined Covenant in 2004, bringing decades of experience guiding clients through holistic planning.



Jeff Chapman

Covenant Family
Wealth Advisors

CPA, CMA, FFI Fellow, ACFBA, ACFWA, Birkman Master Certified, CKA

Partner at Covenant, Jeff specializes in family business advising, helping families strengthen relationships, improve communication, and navigate the people side of business and wealth transitions. A CPA with experience in executive, management and board roles, Jeff combines financial expertise with behavioural profiling, coaching and family business planning.



Rob Radloff

Covenant Family
Wealth Advisors

BCom, CPA, CA, CFP, CLU

Partner at Covenant, Rob specializes in tax-integrated planning, corporate structures, wealth transfer and business transition for business families. A Chartered Professional Accountant who has worked in financial services since 1997, he brings extensive experience in financial and estate planning, exit planning and shareholder structures.



Steven Krause

Avisar Everyday

CPA, CA, CPA (Illinois), ICD.D

CEO of Avisar Everyday, where he works with business owners to strengthen financial foundations, identify key drivers of growth, and navigate complex business decisions. His experience spans private and public companies across a wide range of industries.



Kevin Scott

KSW Lawyers

LL.B., CICA, CBA

Partner and head of the tax group at KSW Lawyers. Former world-record holder-turned-tax lawyer, Kevin specializes in corporate and individual tax planning, wealth and succession strategies for private businesses and estates.





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AGENDA

2:30–2:40	Welcome	Mark Brandsma
2:40–3:10	Strengthening Family Dynamics in Business Using personality insights and the Birkman Method [®] to improve communication and working relationships within the family business.	Jeff Chapman
3:10–3:40	Estate Planning for Business Owners: When to Consider a Corporate Trustee How a corporate trustee may be appropriate for business owners with complex estates, business interests and succession responsibilities.	Mark Brandsma; Steven Krause
3:40–3:50	BREAK	
3:50–4:20	Smart Compensation Strategies for Business Owners Tax-efficient remuneration planning, salary versus dividends, and family income-splitting opportunities.	Kevin Scott
4:20–4:50	Structuring Your Business for Long-Term Success How the right corporate structure can help manage taxes, protect wealth, support succession and prepare for future transitions.	Rob Radloff
4:50–5:00	Q&A	Mark Brandsma
5:00–6:00	NETWORKING	



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