

For close to 35 years, we at Creaghan McConnell Group have been privileged to offer advice and support to Canada's finest business families. This comes in the form of sound estate planning that enables both the business and the family to protect what they have in the near term and ensure they're set up to thrive long into the future too.

There are variety of factors at play here. One we've witnessed up close with many families is the need for strong, focused leadership – often professional management that's recruited from outside the family. We believe in this strategy and have seen it work exceptionally well for many families.

And now we're "eating our own cooking." **We're pleased to announce the appointment of Craig Postons as CMG's own CEO, the first in our history.** We believe his leadership will enable us to better serve our business families both now and long into the future.

There are further details on Craig's appointment below. *But first a quick story.*

We're a business family too – one that failed the first time around.

Back in 1875, J.D. Creaghan immigrated to Canada from Ireland, eventually building a chain of retail stores that became known as the "Eaton's of New Brunswick." But after three generations of family ownership, differing expectations, *and lack of a clear succession plan*, J.D.'s grandchildren sold the business a century after it began.

One of those grandchildren was our own co-founder, Frank Creaghan. At the time of the sale, Frank was a successful insurance advisor of more than 20 years and also a member of J.D. Creaghan's Board of Directors. He deeply regretted the sale of the company, feeling that the family heirloom was sold because they couldn't find a way to plan properly.

Fast forward to 1987.

Frank became passionate about an idea: to establish Creaghan McConnell Group (together with Peter Creaghan and Marty McConnell) as a way to help 'families in business' successfully transition from one generation to the next – and to avoid what happened to J.D. Creaghan. In 2000, Bob Gould joined our firm as a Partner. Since then the three of us, along with the entire CMG team, have had the privilege of serving many of Canada's business families (and their advisors) in managing the destiny and future growth of both their families and their businesses.



And now we're taking our advice to heart in planning for the future growth of our own company.

In the past year or so, we've given much thought to what the longer-term future holds for CMG. What do we want for our company? How can we serve and support Canada's business families (who we consider to be "national treasures") even better? And how will we build our company to be a thriving enterprise that attracts the very best people — and lasts far beyond the three of us into the next generation of leaders at CMG?



It became clear in our planning that we've reached a stage where we'd benefit from full-time, focused leadership in order to execute on our vision to be the "go to company" that families immediately turn to for support. **So we're delighted to announce Craig as our CEO.** He'll have overall responsibility for leading CMG, for developing our future leaders, and for freeing the three of us up to do what we think we do best and certainly enjoy the most — working with our clients and their advisors.

Craig's appointment builds on our past and our success to date — and all three of us see this as a vital step forward for CMG. He knows our business, having spent the first half of his career in various executive roles at one of Canada's largest insurance companies and then later running his own successful consulting business. He also has a solid understanding of the families we serve, what makes CMG unique, our opportunities to be even better — and especially our culture. He should... he's worked with us since 2010 on a consulting basis, so he's had an 11-year job interview!

Together with Craig, we're also pleased to announce the key members of his leadership team at CMG:

- **Horst Finkbeiner | Chief of Staff & Corporate Services.** Horst will provide overall operational support to Craig in driving our vision — with a keen attention on the things necessary to serve our clients even better today and long into the future. Horst's team also provides critical corporate services like HR, I.T, Financial Reporting, Office Management and Project Management to all of CMG.
- **Holly Rispin | Vice-President, Family Capital Services.** Holly works closely with Bob in providing a suite of family capital services in the areas of governance, trust and communication, and family office organization, enabling families and their advisors to get closely aligned on the vision for both the family business and the "business of the family." We believe the transition of 'human capital' from one generation to the next is equally important to the financial transfer that occurs among successful business families.



- **Bryan Lew Yew Pha | Vice-President, Insurance & Financial Modelling Services.** Bryan has worked with CMG for nearly 10 years, and leads a strong internal team of specialists that designs and models estate planning solutions for our client families. He and his team work particularly closely with Peter, Marty and our clients.



- Craig will announce other key additions to his leadership team as he moves forward in the next few months, rooted in the principle that “everyone at CMG either touches a client directly or touches someone who does.” This principle keeps us honest in continually raising our game for our clients.

As for three of us? We’re not going anywhere. This isn’t a signal of our impending retirements. We’re not backing away. Quite the opposite. We see it as a way for us to re-focus and re-energize ourselves in supporting the families we serve. We expect that Craig will free up a lot of our time and attention, and we honestly love that. We look forward to great things ahead with he (and Horst, Holly and Bryan) and all of Creaghan McConnell Group.

To you, our clients and advisors and ‘friends of CMG,’ thank you all for your continued trust in our company, our team and our own future.

A handwritten signature in blue ink, appearing to read 'Peter Creaghan'.

Peter Creaghan
Partner

A handwritten signature in blue ink, appearing to read 'Marty McConnell'.

Marty McConnell
Partner

A handwritten signature in blue ink, appearing to read 'Bob Gould'.

Bob Gould
Partner