

Today, we're delighted
to announce that our company's
official name is changing to
Creaghan McConnell Gould
effective September 6, 2024



This change reflects the commitment of our owners – Peter Creaghan, Marty McConnell and Bob Gould – to build a 3rd generation business in serving and supporting Canada's business families.

We began this business in 1987, inspired by our founder, Frank Creaghan, and his passion for helping families avoid the misfortune that befell his grandfather's company many years earlier. In 1875, J.D. Creaghan immigrated to Canada from Ireland with hopes for a better life. He settled in the Maritimes, building a chain of retail stores that became known as the "Eaton's of New Brunswick." After three generations of family ownership and the lack of a clear succession plan, J.D.'s grandchildren finally sold the business – a century after it began. One of those grandchildren, Frank, long regretted the sale, feeling that the family had options that were never properly explored. In effect, the family heirloom was sold because they couldn't find a way to plan properly.

Frank used this experience as fuel to begin Creaghan McConnell Group with his son, Peter, and son-in-law, Marty. Bob joined our firm as a partner in 2000. Over the years, Peter, Marty and Bob have deepened their focus on what one of our most respected clients refers to as "the business of the family." They've done it by combining each of their unique skills to enrich CMG's understanding of families and how we can best support them. In Bob's case, this has included a particular passion and expertise for helping both the leading generation and the "rising gen" in families get clear and confident in coordinating around their wealth.

Now, at this chapter in our history, Peter, Marty and Bob are further unifying their efforts to build an even bigger and better CMG over the next 50 years. You could call this "eating our own cooking." And so it also seems right (and I know particularly for Peter and Marty) that our company be known as **Creaghan McConnell Gould** going forward – *and that Bob's name be part of our name.*

Part of building a 3rd generation business means assembling a team of unique talents and capabilities – from family capital advisors, financial modellers, insurance designers and underwriters to specialists in family governance, client service, tax and actuarial expertise, as well as innovative marketing efforts that bring families and advisors together to learn from each other. We believe our new name reflects this "ensemble" approach to supporting families. Indeed, it's how our entire company works. It's a team that's now 40+ strong and growing – and, like the families we serve, it's a company we expect to continue far beyond our current ownership.

We're proud of our history, of our true partnership (a rarity in our business...) and particularly of the way we support the business families that mean so much to Canada and its future. We see these multi-generational businesses as the backbone of our economy, as deeply deserving of our respect, and especially worthy of our efforts to ensure their continuity for future generations. This is the WHY of what we do.

On behalf of Peter, Marty and Bob – and the entire **Creaghan McConnell Gould** team – our sincere thanks to the families and advisors who entrust us with your business and believe in what we do. It's a privilege to serve you. And we look forward to sharing further updates in the months ahead as we continue to invest in serving Canada's business families.



Craig Postons
CEO
Creaghan McConnell Gould

P.S. *Our name change requires no action on your part.* The CMG website and e-mail addresses remain the same. (We thank Bob for having a five-letter last name that starts with G...)

Friday, September 6, 2024