

# Celebrating Small Business Success:

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# The Cash & Customers Conference



**In Celebration of Small Business Month the Saanich Peninsula Chamber of Commerce is proud to host a FREE workshop event for all Small Businesses on the Peninsula:**

**Friday, October 28th, 9:00 a.m. – 2:00 p.m., at the Mary Winspear Centre**

Proudly presented by Investor's Group, Viscount Aero Centre, and CIBC!

**RSVP now for this FREE (limited seating) event and you will gain essential knowledge to help your firm succeed:**

- Thinking of buying or selling a business? Learn the in's n' out's of a proper valuation!
- Need Customers? Learn how to organically drive traffic to your website and convert visits to customers!
- Did you know only 9% of Canada's Small Businesses Export? (down from 10 years ago) Learn how to get your business ready to capitalize on a global recovery! Position your product or service for international growth.
- Thinking of expanding or refreshing your inventory? Learn the essentials that will help you secure business financing! ..Especially helpful during these times of low interest rates...
- Want to save on taxes? Learn the best ways to transfer money out of your business... Tax Free!
- Please read on for presentation synopsis and Speaker Bios!

**RSVP now. Space is limited and the price is right!**  
Call 250 656 3616 or email [info@peninsulachamber.ca](mailto:info@peninsulachamber.ca)  
to get your name on the list!

Breaks and Lunch proudly provided by:



## Presentation Details

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### **Doug Taylor, B.A., M.Sc., C.I.T.P.**

Managing Director, Pacific Business Intelligence Ltd.,  
Executive Director, Saanich Peninsula Chamber of Commerce

### **Presentation: Export Basics for Small Business**

This session will provide insights, ideas, real success stories and strategies to sell and succeed in the international marketplace. From understanding effective market entry strategies, to why accepting cultures are critical to international success, to figuring out the real value of the internet for your international presence, this session will enlighten, entertain and motivate you to explore the opportunities of going regional, national and international.

#### **Presenter Bio:**

Pacific Business Intelligence Ltd. (PBI) an international business consulting firm that has undertaken assignments in over thirty countries in Europe, Asia, North America, the Middle East and the Caribbean for private industry, governments and international organizations.

In addition to operating his consulting practice Doug is an Adjunct Professor in the Business Faculty at the University of Victoria. He has also taught at York University, the British Columbia Institute of Technology and Seneca College in Canada, and at Singapore Polytechnic and the Marketing Institute of Singapore in Singapore.

Doug is also a noted public speaker on the process of international marketing/business development and SME technology business strategies and a regular contributor to Douglas Magazine in Victoria.

He has been on the Board of Directors for the Wise Energy Cooperative, the Entrepreneurial Learning Foundation, the Camosun College Foundation Board, the Vancouver Island Advanced Technology Centre, the Greater Victoria Film Commission and the BC Biotech Alliance. He was the founding Chair of the Greater Victoria Enterprise Partnership, and the International Science & Technology Committee for the Science Council of British Columbia. Doug has also been a Director of the Association of Professional Economists of B.C., the Canada-Singapore Business Association, the Malaysia-Canada Business Council and the Canadian Institute for Climate Studies.

### **Mike Lenz, CBI, H.B. Mus., CMEA, CSBA**

Certified Business Intermediary and Principal,  
Vancouver Island Business Sales

### **Presentation: "What is your business worth?"**

It is essentially introduction to business valuation for the small business owner. In the presentation we will discuss among other things, multiples, profit - whose and how is it defined, rules of thumb, value drivers, market comparison, does deal structure affect value, fair market value, the 3 main methodologies in business valuation - earnings based, asset based, and market based as well as the too often forgotten fourth methodology, six pack. This is just a 9,000 foot overview intended to bring awareness to business owners of what they can do to increase the value that is for most of them their largest asset.

### **Presenter Bio:**

Mike is a successful entrepreneur and broadly engaged human being. Mike has founded 2 companies and purchased 3 more over the last 15 years. All are still a profitable success for their current owners. It was Mike and his wife Rebecca's love of the West Coast and, in particular of Victoria, which led to the decision to sell their business interests in Toronto, pack up the children and the dog and head west. On a scouting trip to Victoria, hunting for a suitable business opportunity, the concept of business brokerage crept into his consciousness and soon it was apparent that this should be his new vocation. For the past six years Mike goes to work excited with the opportunity to help people see their dreams become reality; either by buying a business or capitalizing on years of hard work by selling the business they have built.

Mike brings his record of entrepreneurial success to the process of his new vocation as a business intermediary. Mike built his printing company in Toronto from a tiny shop with antiquated equipment doing a few hundred thousand in annual revenue to a dynamic, modern operation with sales of over \$5,000,000 and a staff of 25 in his 10 years at the helm. Well versed from marketing to administration, Mike is proud to be the first Certified Business Intermediary on Vancouver Island and one of only a few in all of British Columbia.

Mike is a person of high ideals and ethical grounding, a lover of nature, sport, music, literature and comedy in any order they may present themselves. Mike's original training was in the performing arts. He holds an Honours Bachelor of Music Degree and remains a patron and supporter of the arts. In the community, Mike is a football coach and sometime volunteer with assorted community groups. Mike is a Certified Business Intermediary as awarded by the International Business Brokers Association, a licensed Real Estate Agent in the province British Columbia, and holds a Certified Machinery & Equipment Appraiser designation from the NEBB Institute.

**Milica Ivaz, CFP, CSA**

Division Director  
Investors Group

**&**

**Mike Kalinka BA MBA CFP CPCA**

Division Director & Senior Financial Consultant  
Investors Group

### **Presentation: Financial Planning for Business owners**

While everyone must address retirement, tax minimization and protection planning, business owners have unique needs requiring special attention and care. Attend this workshop and learn:

- How to maximize amount of interest that is tax deductible using cash damming
- How to convert your business into retirement income
- How to maximize your retirement income without selling your business

### **Presenter Bio:**

Milica was born and raised in Europe where she received her Bachelor of Arts Degree. Due to the political and economic circumstances in her native country, Milica and her husband decided to immigrate to Canada in 1993. It was a hard and emotional decision to make! In pursuit of a more stable life, she left behind a successful career with a renowned French bank and her family and friends. The usual struggle of an immigrant to a new country only lasted about three months before she got her first job in Canada.

In her search to continue her career in the financial industry, Milica chose Investors Group as a sound and prominent company. Since joining Investors Group in 1995, Milica has been an Assistant, an Associate Consultant, Consultant and in 2009 accepted a Division Director role. Today, she runs a successful financial planning practice and is well known financial educator in her community.

Mike Kalinka is a financial planner and well-known speaker on financial education. He leads a team of advisors and provides investment, retirement, tax, insurance, and estate planning services to families and business owners in Victoria and lower Vancouver-Island. Mike is passionately involved in local community initiatives and philanthropic efforts. He is currently an executive on the board of AIDS Vancouver Island, past Community Services Director of Victoria's Harbourside Rotary Club, and is involved with many of Investors Group's initiatives including the Alzheimer's walk.

### **Pooja Sund, BA**

Financial Advisor, Business  
CIBC Securities Inc.  
P: 250.544.5080 ext. 449  
F: 250.652.1746  
C: 250.884.9790

### **Presentation: Business Banking—What's Required for Successful Financing**

#### **Presenter Bio:**

As your dedicated Financial Advisor, Business, Pooja Sund has the business banking experience to provide you with advice and tailored solutions to help you reach your business and personal financial goals. She has been in the financial services industry since 2006. She has a Bachelor of Arts Degree. As a member of the Chamber of Commerce, she also maintains in touch with the local business community. She has the knowledge and experience that enables her to understand the unique issues facing small business owners. As a result, she provides integrated solutions and advice to help you and your business succeed. She's also fluent in Punjabi and Hindi.

### **Ryan Labelle, Owner & Teagan McKay, Web Developer**

Honeycomb Webworks

### **Presentation: More Website Visits!**

What would you do for more qualified website visitors? What if those new visitors purchased a product, service or contacted you for more information? Would you consider that a return on your advertising investment? Ryan and Teagan will show you how to generate qualified traffic to your website and how to track goals so you can calculate a return on investment!

- We make it easy. No tech jargon.
- We are brief. Bite sized workshops. 1 hour max.
- We are consistent. Once a month.
- We are relevant. Our focus is on web design, social media and online marketing.

#### **Presenter Bios:**

Honeycomb Webworks are certified creative web professionals looking to make lasting relationships with unique individuals in the small business community. Honeycomb is focused on generating value for our clients through measured results through over 10 years of web experience including design, development, marketing and strategy.

Ryan and Teagan have worked together for two years helping many local small business operators in Greater Victoria and the Saanich Peninsula launch awesome websites. They especially enjoy working with small businesses and solopreneurs who always have a genuine enthusiasm and passion for new ideas. They design and create out of a small office in Central Saanich overlooking the beautiful Island View Valley. Both Ryan and Teagan enjoy involvement in the local community groups, The Prodigy Group, Saanich Peninsula Chamber of Commerce and the Peninsula Celebrations Society.