



# FFI Global Conference

## London 2018, October 24-26

Park Plaza Riverbank, 18 Albert Embankment, London

[SCHEDULE](#)

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## **Join the 2018 FFI Embankment Festival!**

**Camp out on the Thames for three days as you challenge and joust with your intellectual and personal best self at this festival of ideas and activities that will improve your understanding of yourself and the modern day family enterprise field.**

Festivals are many things around the world. They can be community events to recognize and celebrate unique traditions. They can be expressions of art and demonstrations of talent. They can be challenges to think outside of the box and experiment with something new. You'll find all of this and more in London in October.





# **SCHEDULE**

## **October 24-October 26**

**WEDNESDAY**

**THURSDAY**

**FRIDAY**



# Wednesday, October 24, 2018

**9:00AM – 4:00PM**

## **PRE CONFERENCE SESSIONS**

### **GEN 503 Tools for Positive Change in Family Business Systems: Analysis and Application**

**Faculty:** Andrew Hier, Cambridge Advisors to Family Enterprise; Carlo Salvato, Bocconi University

**Location:** Plaza 6-7

#### **Description**

This course for advanced practitioners will review key forces at work in family business systems, providing an overview of frameworks for capturing and analyzing critical information. Tools and techniques for achieving meaningful change with clients will be applied to selected case exercises. Developing skill for critical analysis will underpin all elements of the day.

### **GEN 504 Meaning and Purpose: Philanthropy and the Family Enterprise**

**Faculty:** Jim Coutre, Fidelity Family Office Services; Elaine Martyn, Fidelity Charitable; Maya Prabhu, Coutts & Co.

**Location:** Plaza 1-2

#### **Description**

This course delivers:

- An awareness of current trends in philanthropy and how wealthy individuals and families engage in philanthropy today — including the emergent field of Impact Investing
- An understanding of how today's high and ultra-high net worth families are expressing their values and working towards social and environmental impact through their philanthropic giving
- Practical approaches, both relevant and rigorous, to position philanthropy at the heart of conversations on values, succession planning and preparing the next generation
- An understanding of how to discuss philanthropy with clients to deepen relationships and win more business
- Opportunities for debate, case studies, and reflective exercises to enhance learning and enjoyment

*\*These two courses partially fulfill the requirements for Advanced GEN Certificates. Visit [ffigen.org](http://ffigen.org) for more details on the GEN program.*

**1:30PM – 4:30PM**

### **Iberoamérica Meeting**

**Location:** Plaza 3

**5:30PM – 7:30PM**

## OPENING RECEPTION

### Mark Bagnall, Artist-in-Residence

Mark Bagnall is a British film, television and stage actor. He has been in numerous features films and television programs including The Bill, Doctors, Casualty, Holby City, Robin Hood, and Midsomer Murders. A skilled stage performer, Mark employs comedy, narration, and improvisation in his live work. Mark will be “acting out” throughout the conference in sessions and in unexpected places!

**Location:** City Suites

*Sponsored by U.S. Trust Family Office*

## Thursday, October 25, 2018

**7:30AM – 9:00AM**

### Global Education Network Awards Breakfast

**Location:** City Suites

#### Description

Join colleagues to recognize and congratulate GEN certificate program graduates, new FFI Fellows, and GEN scholarships recipients.

**9:30AM – 10:30AM**

### CONCURRENT SESSIONS

#### Assessing and Developing Governance Competencies: An integrated approach to managing family talent

**Presenters:** Devin DeCiantis, Nicolas Hollanders, Ivan Lansberg, Lansberg, Gersick & Associates LLC

**Host:** Annie Koh

**Location:** Plaza 1-3

#### Description

Successful business families combine a strong vision and strategy, sustainable governance structures, and the best use of family talent in key roles. This presentation will explore how a family-specific, scaled competency system can help select, develop, and deploy family talent to support the performance and continuity of a family enterprise.

#### A Visit to the Festival Fortune Teller: Forecast of three future trends for family-owned enterprises



**Presenter:** Patricia Annino, Rimôn P.C.

**Host:** Debbie Bing

**Location:** Plaza 6-7

#### Description

This session will address forecasting future trends: a) you can't litigate love (so why are you trying?) – there will be increased litigation dealing with succession and control issues; b) evolving succession challenges in a seven-generation world; and c) increasing the visible (formerly invisible) power of women as family members, on boards and as in-laws.

## The Power of Contracting

**Presenters:** Judi Cunningham, Kennesaw State University; Wendy Sage-Hayward, The Family Business Consulting Group

**Host:** David King

**Location:** Plaza 9-10

#### Description

Contracting is an often overlooked, but critically important, element of engaging and working with family enterprise clients when contracting with multiple family members in complex and sensitive landscapes. This session explores contracting best practices to avoid pitfalls that often result when contracting is done poorly.

### ON THE MAIN STAGE

## The Diversity of Deviance: How breaking the rules can hurt (and help) families and family firms

Deviant behavior has different antecedents and effects based on variation in family systems and family firms. Using lecture and small group discussion, this session outlines the diversity in types and outcomes of deviance and provides attendees with the means to use deviance in the family and family firm to improve performance.

**Presenters:** Kim Eddleston, Northeastern University; Roland Kidwell, Florida Atlantic University

**Host:** Dan Bayston

**Location:** Ballroom 1 (Main Stage)

**10:30AM – 11:00AM**

## Hospitality Break

**11:00AM – 12:30PM**

## CONCURRENT SESSIONS

## Artistic Engaged Scholarship: Creative art labs on family business

**Presenters:** Nicholas Bailey; Angela Carradus, Manchester Metropolitan University; Jane Glover, Kiran Trehan, University of Birmingham

**Host:** Jeremy Cheng

**Location:** Plaza 9-10

#### Description

This presentation uses dramaturgy and story-telling as research methods to explore the lived reality of leadership in family business. The session uses the idea of a creative lab with researchers working with family business owners and Nicholas Bailey, professional actor, to explore how different forms of art and media can be used to challenge people to think differently about how they conduct research and how they communicate with audiences beyond academia.

### Celebrating the Practitioner's Spectrum

**Presenters:** Elle Hansen, REGENERATION; Steve Legler, Shift Your Family Business; Natalie McVeigh, Wells Fargo Private Bank; Mairi Mickel, Mairi Mickel's Business Families

**Host:** Elizabeth Bagger

**Location:** Plaza 6-7

#### Description

This interactive session allows participants to experience through live-performance a demonstration of the Practitioner's Spectrum using a co-created case-study. The presenters will explain a practitioner's inner dialogue in real-time. There is no 'right way,' despite the desire of advisers to 'solve.' Participants learning will be increased from exploration and use of the spectrum.

### To Share or Not to Share: How will the shared economy impact the field of family business?

**Presenters:** Giana Eckhardt, University of London; Andrew Keyt, Loyola University Chicago; Domingo Such, Perkins Coie

**Host:** Stuart May

**Location:** Plaza 1-3

#### Description

AirBNB, Uber, Zipcar—the shared economy is disrupting industries across the world. This session will look at the basic principles of the shared economy and engage with the audience to explore the potential for the shared economy to disrupt the field of advising family businesses.

#### ON THE MAIN STAGE

### Organized Improv: Optimizing team development for team productivity

This session will feature insights regarding two specific team development models with the FFI adviser community, in the hope that exposure to a set of ideas that may be quite different from current technical expertise will help provide even more value to clients.

**Presenter:** Jessica Geiben Lynn, CFAR — joined by artist-in residence **Mark Bagnall**

**Host:** Paul Westall

**Location:** Ballroom 1 (Main Stage)

#### 12:30PM - 2:00PM LUNCH & LEARN

### General Lunch

**Location:** City Suite 1

### GEN Faculty Meeting

**Location:** City Suite 3

### Global Research Report of Findings on Family Enterprise

**Presenters:** Alex Hayward, Helena Robertsson, EY Global Family Business Center of Excellence

**Location:** City Suite 2

#### Description

Presenting findings from a Global Research Report on 420 High Net Worth Family Owned Companies.

### LGBTQIA Issues in Family Enterprise Advising

**Host:** Kyle Danner, Kyle Danner Family Business Advisor

**Location:** Plaza 4

#### Description

This informal gathering provides an opportunity for conference participants to discuss issues they have encountered—either in their advisory practices or personally—in working with lesbian, gay, bisexual or transgender aspects of advising family enterprises. Focus will be on developing best practices in this area.

### Mental Health & Addiction: A concierge approach

**Presenters:** Ed Levin, Levin Mental Health Consulting; Mark Burdick, Burdick Psychological Services

**Moderator:** Jamie Weiner

**Location:** Plaza 8



#### Description

Ed Levin, LICSW and Mark Burdick, PhD facilitate an informal conversation to help you assist your clients navigate the complex world of treatment options.

## 2:15PM – 3:15PM CONCURRENT SESSIONS

### Invisible Decision Makers: The role of the matriarch in Asian family business

**Presenter:** Linda Salim, Sustainable Family Business Planning & Consulting

**Host:** Grégoire Imfeld

**Location:** Plaza 6-7

#### Description

This presentation focuses on the role of matriarchs in family business decision-making. While they hold a major role, matriarchs who are not officially involved in the businesses are often forgotten. Looking into how they influence decision-making opens up discussions on how to tackle problems in family business.

### Jousts, Feats of Strength and Games of Chance: Common causes and outcomes in family-owned business legal disputes

**Presenter:** Michael Connolly, Murtha Cullina LLP

**Host:** Catherine Rossbach

**Location:** Plaza 9-10

#### Description

Family-owned business legal disputes are often disruptive, time-consuming, and expensive. Such disputes typically arise from disagreements involving Paper (documents), Process (decision-making), or People (dynamics among stakeholders). Join this discussion to explore these three common flashpoints, to learn the various outcomes, and to learn ways to avoid or mitigate these disputes.

### Should Anything Last Forever? How evolving family interests can be leveraged to benefit business and giving over time

**Presenter:** Donzelina Barroso, Rockefeller Philanthropy Advisors; Grant Gordon, William Grant Foundation; Alex Scott, Sandaire

**Host:** David Harvey

**Location:** Plaza 1-3

### Description

Come gain insights from three successful families with business and philanthropy interests. Hear directly from members of the William Grant and Scott families, and gain an understanding of the Rockefeller family approach from Rockefeller Philanthropy Advisors. An interactive discussion will highlight the strong connection between business and philanthropy and help you to identify key points to leverage for long-term success in your own family philanthropy and/or business.

### ON THE MAIN STAGE

#### Shakespeare and Family Business: To be or not to be?

William Shakespeare is commonly described as a “writer for all ages.” His work endures because it speaks to the human experience. This presentation explores and examines Shakespearian themes that might be usefully applied to working with—and in—family businesses.

**Presenter:** Lloyd Steier, University of Alberta School of Business — joined by Artist-in Residence Mark Bagnall

**Host:** Prudy Gourguechon

**Location:** Ballroom 1 (Main Stage)

**3:15PM – 3:30PM**

### Hospitality Break

**3:30PM – 5:00PM**  
**CONCURRENT SESSIONS**

#### Celebrating the Past, Writing the History of the Future

**Presenters:** Christine Blondel, INSEAD; David Bork, Family Business Matters; Rania Labaki, EDHEC Business School

**Host:** Nadine Kammerlander

**Location:** City Suites

### Description

The session contributes to the festival of family business ideas through a celebration of 50 years of research and practice, with a particular focus on the experience of David Bork. We engage in a reflection with the audience to shape the future on how best we can serve family businesses.

**ON THE MAIN STAGE**

**Mixing in Royal Circles: A play in one act**

An impromptu 'in the round' play of two family council meetings will be facilitated. Characters, played by delegates, respond to interventions and guidance of a role-playing family business adviser. There will be learning reviews between and a final review at end for 'takeaway' learnings.

**Cast:** Susan Kaye, The Challenge of Excellence Ltd.; Artist-in-Residence Mark Bagnall; and an all-star FFI acting troupe

**Location:** Ballroom 1 (Main Stage)

**5:15PM-6:15PM**

**Trusted Family Reception**

(PRE-REGISTRATION REQUIRED)

**Location:** Plaza 1-3

**6:30PM**

**Dinner On Your Own**

**6:30PM - 8:00PM**

**Speakers and Sponsors Reception**

(BY INVITATION ONLY)

**Location:** KPMG





# Friday, October 26, 2018

**7:30AM – 9:00AM**

## **General Breakfast**

**Location:** City Suites 2-3

## **Fellows & GEN Alumni Breakfast**

(BY INVITATION ONLY)

**Location:** City Suite 1

**9:15AM – 10:15AM**

## **CONCURRENT SESSIONS**

### **Aligning Long-Term Incentive Compensation**

**Presenters:** Trish Botoff, Botoff Consulting; Tayyab Mohamed, Agreus; Kirby Rosplock, Tamarind Partners Inc.

**Host:** Rodolfo Paiz

**Moderator:** Jim Coutre, Fidelity Family Office Services

**Location:** Plaza 1-2

#### **Description**

The use of LTI compensation has been a growing trend in both family businesses and family offices. However, implementing LTI plans is a complex endeavor, with many design and implementation considerations for families. An overview of various LTI plans, best uses, and design and implementation considerations will be presented.

### **Rites of Passage in a Land of Giants**

**Presenter:** Jamie Weiner, Inheriting Wisdom

**Host:** Richard Boyce

**Location:** Plaza 3-4

#### **Description**

Born into a world of giants, emerging adults struggle with growing up in the “shadow.” Redefining “rites of passage” creates a path for rising generations to emerge into productive relationships between generations. Participants will actively explore “rites of passage” stimulated by the voices of rising generation family members.

### **Self-awareness and Self-management: Be fully present for the client**

**Presenter:** Pilar Tolentino, Ateneo Family Business Development Center

**Host:** Daphne McGuffin

**Location:** Plaza 9-10

#### Description

Family business advisers should not get lost with all the happenings around them. Learn self-awareness and self-management and how to focus on the beauty and opportunities for the client. Hear music (amid noises); see colors (through the sights); identify growth movements (not meaningless/unrelated events); and connect with people (beneath masks/costumes).

**10:15AM – 10:45AM**

### Hospitality Break

**10:45AM – 12:15PM**

### CONCURRENT SESSIONS

#### Socratic Dialog: A revolutionary tool for business families

**Presenters:** Alberto Gimeno, ESADE Business School and Socratic Dialog Institute

**Host:** Fabian Bernhard

**Location:** Plaza 1-2

#### Description

In this workshop, participants will be exposed to a revolutionary new insight and methodology: Socratic Dialog. After a short explanation of the basic elements that define Socratic Dialog, participants will experience, on a practical level, the enormous possibilities that this methodology offers to develop healthy and competent business families.

#### The Healing Mandala™: Mindfulness, art, & appreciative storytelling

**Presenters:** Laura Allen, Jean Meeks-Koch, Positively People, LLC.

**Host:** Natalie McVeigh

**Location:** Ballroom 1

#### Description

This session will look at a methodology for families to come together and share individual realities, seek forgiveness, and embrace healing. This approach provides a construct that draws from the past, anchors emotions in the present, and provides a way for families to engage in healing.

#### The Mirror Maze: Changing your reflection

**Presenter:** Kirsten Taylor-Martin, Grant Thornton Australia, Ltd.

**Host:** Asher Noor

**Location:** Plaza 9-10

#### Description

Mirror, mirror on the wall, who is the most diverse of them all? Take time to reflect and be challenged by the power of diversity of thought. This interactive session will showcase the power of diversity in Australian family businesses. Come and join in the fun!

## Welcome to the Culture Fair: Ethnographic methods to make the strange familiar

**Presenter:** Debbie Bing, CFAR

**Host:** Tamás Kürti

**Location:** Plaza 6-8

#### Description

This hands-on workshop will demonstrate an ethnographic approach to consulting – built on anthropological observation methods and developed through years of practice – and will explore how it can provide another way of joining with and ultimately helping a family.

**12:15PM – 1:30PM**

## General Lunch

**Location:** City Suites 1-3

**1:00PM – 1:30PM**

## Annual Meeting

**Location:** Plaza 3-4

**1:30PM – 3:00PM**  
**CONCURRENT SESSIONS**

## Family Offices, Fiefdoms, Fallacies, and Fables

**Presenters:** Tony Bogod, Tim Carvosso, Resonance Partners LLP.

**Host:** Alex Hayward

**Location:** Plaza 1-2

#### Description

This interactive workshop examines the world of the family office, raising questions like: What is a family office really? How do you measure success? What do family offices do well –or badly? What are common pitfalls to look out for when working with family offices, whether from within or without? We will be joined by a member of the 5th generation of a global family business who will give insights from the family's perspective. The individual will share with us her own experiences in dealing with family office advisers and the challenges of making sure approach and advice are useful and appropriate.



## The Generative Alliance: Culture and evolution of 100-year family enterprises

**Presenters:** Dennis Jaffe, Wise Counsel Research; Alex Scott, Sandaire; Andrew Wates, Wates Group

**Host:** Isabel Botero

**Location:** Plaza 6-8

### Description

This session will share stories from two family leaders and a research study about cross-generational evolution of global 100-year family enterprises. We explore the generative alliance that integrates family stakeholders, including stewards concerned with legacy and culture, craftsmen creating a disciplined business structure, and opportunists seeking innovative opportunities and new pathways.

## Transitioning Voting Shares: Making clarity out of chaos

**Presenters:** Dan Frosh, Frosh Family Business Consulting; Henry Hutcheson, Family Business USA

**Host:** Vaughan Scott

**Location:** Plaza 9-10

### Description

This session will explore four unique family business case studies, showing how creativity enabled a smooth transition of control and maintained family harmony.

### ON THE MAIN STAGE

## Unmasking Imagination and Creativity: A mask-making workshop to explore how creativity can mediate family business solutions

Join a mask-making workshop to explore how creativity can mediate family business solutions. The ancient human custom of mask-making can empower all generations of a business family. By examining emotions, values and identity, creativity and imagination can be unlocked to create opportunity.

**Presenters:** Charlotte Dillon, RoundTable Global; Oliver Hallam, Oliver Hallam Mediation

**Host:** Guillermo Salazar

**Location:** Ballroom 1 (Main Stage)

## 3:15PM – 4:15PM CONCURRENT SESSIONS

## A Jane Austen Festival for Family Firms and Advisers

**Presenter:** Michael Whitty, Handler Thayer LLP

**Host:** Carlo Salvato

**Location:** Plaza 1-2

#### Description

This session will offer examples from the life and novels of Jane Austen to illustrate timeless lessons for business families and their advisers, including different forms of family capital, succession planning, and addressing demographic realities.

### **The Jousting between the Family and the Business Needs. Who will win?**

**Presenters:** Luis Jimenez Castillo, WPI/Universidad Panamerica; William Stormont, Viscount Stormont

**Host:** Marta Widz

**Location:** Plaza 6-8

#### Description

Balance between the family and the business is important for the sustainability of the family business. The intersect between rationality and emotions creates the perfect arena for a battle between the business's profitability and family's prerogative. This session will simulate difficult situations where participants have to choose the best scenario.

### **Theatre of Intervention**

**Presenters:** Mark Bagnall, Artist-in-Residence

**Location:** Plaza 9-10

#### Description

Join artist-in-residence Mark Bagnall for an interactive acting workshop on the power of intervention. Using improvisation, role play, and other acting techniques, Mark will look closely and explore the options of when intervention is best implemented, and the differing strategies and approaches required to make your personal input successful. Participation will be encouraged!!

**4:30PM – 6:30PM**  
**CLOSING AWARDS**

### **2018 Awards Ceremony & Closing Festivities**

**Location:** Ballroom

## REGISTRATION INFORMATION

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## 2018 CONFERENCE PRESENTERS AND PROGRAM COMMITTEE

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## **HOTEL BOOKING INFORMATION**

**BOOK NOW**



### **FROM OUR ATTENDEES**

**“As a learning and sharing organization, FFI is just extraordinary. You have to go to one of its meetings to understand the generosity with which the members share their experiences and perspectives.**

**A beacon of best practice in terms of professional collaboration and interaction.”**

**ALEX SCOTT**  
FOUNDER, SANDAIRE

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