2018 Conference Presenters and Program Committee

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2018 Conference Presenters

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!

Laura Allen is on the staff of Positively People, LLC, in Charleston, South Carolina.

Patricia Annino is a member of the FFI board of directors and a partner at Rimôn P.C. She is an authority on estate planning and taxation, with more than 30 years' experience serving the estate planning needs of families, individuals, and owners of closely-held businesses.

Nicholas Bailey is a professional actor, best known as Dr. Anthony Trueman in EastEnders. His recent TV and state credits include *Dreamgirls, Strangers,* and *Macbeth.*

Donzelina Barroso launched Rockefeller Philanthropy Advisors' London office in early 2017 and leads RPA's European advisory work. She has more than a decade of experience in international grant-making and project management, including work in education, arts, health, human services, poverty alleviation, and environmental issues.

Debbie Bing, FFI Fellow and secretary of the FFI board of directors, is president of CFAR, a consulting firm celebrating 30 years of advising family businesses. She helps create leadership, strategic, and continuity plans that bridge family, business, and owner interests.

Christine Blondel, FFI Fellow, has 20 years of experience in the family business field and exposure to hundreds of family business cases through her teaching, writing, conferences, advising and board membership. As adjunct professor of family business at INSEAD she co-directs the one-week programme for business families "The Family Enterprise Challenge."

Tony Bogod, FFI Fellow, is with Resonance Partners LLP in London. He has spent the last 25 years of his career in the family business and family office world. He has seen the gamut of shortcomings, emotions, and issues that can arise from too many assumptions and lack of understanding and planning.

David Bork, FFI Fellow and 1998 recipient of the Richard Beckhard Practice Award, is CEO and president of Family Business Matters. He is an international family business consultant with 50 years of experience providing practical advice, guidance, and support to family businesses in strategic planning.

Trish Botoff is principal consultant and founder of Botoff Consulting and specializes in working with family offices and family business enterprises. The firm offers compensation and benefits consulting services for both executives and broad-based employee groups with a goal of bringing better compensation data to the family business/office/investment firm markets.

Mark Burdick is a renowned international psychologist: UK Chartered, EU registered, and US Licensed. He has worked with many, many high profile families from around the globe and in the USA in assessing risk & need, and making appropriate, clinically sound placements and following through in support of the family and the placement.

Angela Carradus is a Senior Lecturer at Manchester Metropolitan University in the Department for Strategy, Enterprise and Sustainability. Her performance will reflect a moment in history that had a fundamental effect on how she saw herself and her relationship with her husband. They owned and ran a Subway franchise between 2006-2010.

Tim Carvosso, Resonance Partners LLP, has spent the last 10 years as CFO and COO of two substantial family offices. He is experienced in delivering solid and relevant information for the families, while managing to deal with the sensitive nature of some of the relationships and characters that are typically found in the family office world.

Luis Jimenez Castillo is a PhD student at Worcester Polytechnic Institute, focusing on family business. He is a faculty member at Universidad Panamericana in Mexico. He served as the chairman of the board of his family's firm.

Michael Connolly, FFI's general counsel, is a partner with Murtha Cullina LLP in Boston. He represents owners and managers of family-owned and closely-held businesses in connection with disputes concerning entity governance, succession and agreements between stakeholders.

Jim Coutre is vice president of Insights and Connections at Fidelity Family Office Services in Boston. Prior to joining Fidelity, he was a partner at The Philanthropic Initiative (TPI). He is a faculty member for GEN 504.

Judi Cunningham is a visiting scholar at the Cox Family Enterprise Center, Kennesaw State University and consults to business families and advisory firms to assist with the challenges of multi-generational family dynamics.

Kyle Danner, CFBA, holds a Masters in Counseling from the University of Missouri-Kansas City and the Certified Exit Planning Advisor (CEPA) designation from the Exit Planning Institute. Kyle operates a consulting practice advising family-owned businesses on succession and transition planning.

Devin DeCiantis is a management consultant based in Toronto, specializing in financial, operational, and strategic aspects of family enterprise. He is a senior associate at Lansberg, Gersick & Associates LLC and an adjunct lecturer at Harvard University and the Kellogg School of Management at Northwestern University.

Charlotte Dillon is head of house design and co-founder of RoundTable Global in London. She also co-founded Kinetica Museum, the first UK kinetic art museum combining art and technology.

Giana Eckhardt is professor of marketing at Royal Holloway, University of London. She has published widely in the field of consumer culture theory; in particular on issues related to consumer behavior, branding, globalization, the shared economy, and consumer ethics.

Kim Eddleston is Schulze Distinguished Professor of Entrepreneurship at Northeastern University and an academic scholar at Cornell University's Smith Family Business Initiative. She has published more than 50 articles, and her award-winning research focuses on the interface of work and family. She actively participates in her own family's business.

Dan Frosh, CFBA, CFWA, is president of Frosh Family Business Consulting. He was the director of programs and membership of FFI and is now the managing editor for *FFI Practitioner*. He graduated from Suffolk Law School, focusing on estate planning, estate and gift taxation, and closely-held enterprises.

Jessica Geiben Lynn, CFBA, is a principal at CFAR. She has extensive experience working with owner-and family-led businesses, family foundations, and with boards of directors. She is particularly interested in the dynamics of top teams facing challenging strategic and operational decisions.

Alberto Gimeno, FFI Fellow, is associate professor for family business at ESADE Business School. and a former member of FFI's Body of Knowledge committee. He is the founder of Family Business Knowledge (FBK) and secretary general of the Institute for Socratic Dialog (ISD).

Jane Glover is a research fellow at the University of Birmingham business school, focusing on family farming, and explores the experiences of individuals working in these family firms. Her research contributes to the debates on the socio-emotional wealth of family business ownership and the relationships within and beyond the family business. She is a co-recipient of the 2015 *FBR* Best Article Award.

Grant Gordon is a philanthropist and social entrepreneur. With his wife he established the Reekimlane Foundation, a grant-making charity. He also chairs the William Grant Foundation, the charitable organisation of his business family, focusing on creating opportunities for people to thrive in Scotland.

Oliver Hallam is an accredited mediator and independent family business consultant. He helps families with intergenerational succession and inheritance issues to make plans for the future of their businesses before conflict and costs escalate finding workable solutions to a wide range of emotive and contentious disputes.

Elle Hansen, FFI Fellow, is managing partner of REGENERATION in Dallas. She specializes in family business systems, communication, business performance, and team building.

Alex Hayward, CFWA, is the UK & Ireland family office markets leader with EY. He is a faculty member for GEN 202.

Andrew Hier, FFI Fellow, is senior partner with Cambridge Advisors to Family Enterprise, where he assists clients with ownership, business and family issues, including development of the next generation and conflict management. Andrew is a GEN faculty member

Nicolas Hollanders is a senior associate at Lansberg, Gersick & Associates LLC. He was previously the CHRO of Delhaize Group and a partner at Egon Zehnder, leading its global life sciences practice.

Henry Hutcheson, FFI Fellow, is the president of Family Business USA. Henry comes from a family's business and is the author of *Dirty Little Secrets of Family Business*.

Dennis Jaffe is an FFI Fellow and recipient of FFI's 2017 International Award and 2005 Richard Beckhard Practice Award. He is with Wise Counsel Research based in San Francisco and the author of several books, including *Stewardship in Your Family Enterprise and Cross Cultures*. A GEN faculty member, he has proved global insights have led to teaching or consulting engagements in Asia, Europe, the Middle East, and Latin America.

Susan Kaye, FFI Fellow, is a couples, individual and group counsellor, family mediator and managing director and founder of The Challenge of Excellence Ltd. Susan has consulted to family businesses since 1995 specializing in conflict management, succession, values and relationships between and within the family and the family business.

Andrew Keyt, FFI Fellow, is a clinical professor in family business at Loyola University Chicago. He is president and founder of Keyt Consulting, a private firm that assists family enterprises with succession and strategic planning, dealing with family conflict and communication, working with adult sibling / cousin teams, and executing emergency

Roland Kidwell, ACFBA, is a member of the *FBR* Review Board. He is professor of management, chair of the management department, and director of the Adams Center for Entrepreneurship at Florida Atlantic University. His research focuses on deviant behavior in family firms and elsewhere.

Rania Labaki, CFBA, CFWA, is associate professor of management at EDHEC Business School and director of the EDHEC Family Business Centre. She is a co-recipient of the 2015 *FBR* Best Article Award and the 2012 Best Unpublished Research Paper Award.

Ivan Lansberg is an FFI Fellow and one of the founders of FFI. A former editor of *Family Business Review*, and recipient of the 1995 Richard Beckhard Practice Award, he is on the faculty of the Kellogg School of Management at Northwestern and is co-director of family enterprise programs. He and Kelin Gersick founded Lansberg, Gersick & Associates LLC, a research and consulting firm specializing in family enterprise in 1997.

Steve Legler, ACFBA, ACFWA, has a family business background and has managed his family office. He works with business families on transition and legacy matters, as a facilitator, coach and mediator.

Ed Levin has been involved with mental health treatment programs in leadership, marketing, and clinical positions for almost 50 years. His experience in business development and clinical work equip him to be a trusted resource to programs and families when serious mental illness is the focus.

Elaine Martyn is vice president & managing director, Private Donor Group, at Fidelity Charitable.

Natalie McVeigh, CFWA, ACFBA, is vice president, family dynamics consultant with Wells Fargo Private Bank. A certified business coach specializing in entrepreneurial, EQ and C-IQ coaching, she is a faculty member for GEN 501. The 2016 recipient of the Fitzpatrick & Francis Family Business Continuity Foundation GEN scholarship, she is the leader of the Next Gen Practitioners VSG.

Jean Meeks-Koch, ACFBA, is CEO of Positively People, LLC., specializing in advising family enterprises facing significant organizational transitions. She has extensive experience in change management, organizational systems, team cohesiveness development, coaching, psychometric personality and competency assessments.

Mairi Mickel, ACFBA, is founder of Mairi Mickel's Business Families. She provides the support and guidance that business families and their trusted advisers need during key transitions in the family business lifecycle, future-proofing them. She is a GEN faculty member.

Tayyab Mohamed is a director and co-founder of Agreus in London. Agreus is a global family office resourcing and recruitment Firm. The firm is a powerful network of experienced consultants committed to helping family offices plan for growth – finding the right people and making the most of existing resources.

Maya Prabhu, CFBA, ACFWA, is managing director and head of Wealth Advisory Services at Coutts & Co, London. In addition to her management role, as a practitioner, she advises families in the UK, Middle East and Asia on governance, wealth and business succession planning, philanthropy and next generation development. She is a faculty member for GEN 504.

Helena Robertsson leads the EY Family Business practice and Private Client practice in Europe, Middle East, India and Africa (EMEIA). She is a senior partner with more than 20 years of experience in serving as trusted tax advisor for companies and individuals around the world.

Kirby Rosplock, FFI Fellow, is founder and principal of Tamarind Partners, Inc. in Florida and a recognized researcher, innovator, adviser, author, and speaker in the field. She is the author of *The Complete Family Office Handbook*. She is a faculty member for GEN 502.

Wendy Sage-Hayward is a senior consultant with The Family Business Consulting Group and has more than 25 years' experience working with business leaders, family firms, and boards. An educator, author, adjudicator, and family business member/director, she brings deep knowledge and perspective to serving diverse, global clients across sectors.

Linda Salim of Sustainable Family Business Planning & Consulting, has a PhD in family business, focusing on how leaders go through intergenerational succession. The topic was picked to understand the phenomenon in her own family business. She is currently building a family business advisory in her home country of Indonesia, specializing in sustainability planning and conflict resolution.

Carlo Salvato, FFI Fellow and vice chair of the FFI board of directors, is the GEN faculty chair. He is professor of business strategy at Bocconi University in Milan, Italy, has served as an associate editor of the *Family Business Review (FBR)* and has published widely in the field.

Alex Scott founded Sandaire as a family-owned entrepreneurial venture in 1996. A fourth-generation member of the Scott family, Alex led the sale of his family's insurance business in 1994. He is co-founder of the Institute for Family Business, (UK) and a former member of the FFI board of directors.

Lloyd Steier, FFI Fellow, is former vice chair of the FFI board of directors and recipient of the 2010 Barbara Hollander Award. He holds a Distinguished Chair and is director of the Centre for Entrepreneurship and Family Enterprise at the University of Alberta Business School.

William Stormont, Viscount Stormont, is part of a 17th generation Scottish family enterprise and a next-generation family leader.

Domingo Such, FFI Fellow, is firmwide chair of the family office services practice—a multi-disciplinary practice representing family offices and quasi-family office arrangements comprised of operating companies, boards of directors, fiduciaries, beneficiaries—of Perkins Coie in Chicago.

Kirsten Taylor-Martin, CFBA, is a chartered accountant with Grant Thornton Australia and a member of Family Business Australia. Using her extensive experience, she helps families develop tailored governance structures to suit their family needs.

Pilar Tolentino, CFBA, is the assistant director of Ateneo Family Business Development Center of Ateneo de Manila University. As a family business adviser, Pilar is a resource person in the area of strengthening family relationships, professionalizing the family, managing conflicts, bridging multi-generational family members, establishing family business governance, succession planning, and creating family-teams. She is a GEN faculty member.

Kiran Trehan is director of external engagement and professor of leadership and enterprise development at the University of Birmingham. Her research focuses on critical action learning, leadership, and enterprise development in small firms.

Andrew Wates is former chairman of Wates Group, one of the UK's largest privately-owned construction and development companies A keen promoter of family business, he was chairman of the Institute for Family Business and vice-chairman of Family Business Network International.

Jamie Weiner is an FFI Fellow, member of the FFI board of directors and co-chair of the *FFI Practitioner* editorial committee. He is co-founder and partner at Inheriting Wisdom and co-author of *The Legacy Conversation*. He assists families and advisers in navigating the intangible complexities associated with money and wealth.

Michael Whitty, FFI Fellow, is a partner with Handler Thayer LLP and concentrates his practice in estate planning, taxation, and estate & trust administration. He represents business owners, principals of venture capital and private equity funds, key executives, investors, and other high-net-worth individuals in planning for preservation and transfer of wealth.

2018 Conference Program Committee

Elizabeth Bagger, CFBA, is the executive director of the UK-based Institute for Family Business (IFB).

Prudence Gourguechon, is a principal with Invantage Advising in Chicago.

Grégoire Imfeld, FFI Fellow, is responsible for Pictet & Cie's family office services worldwide. He is based in Geneva, Switzerland.

Nadine Kammerlander is the Chaired Professor of Family Business at WHU – Otto Beisheim School of Management.

Tamás Kürti is principal owner and strategic leader of KÜRT Academy in Budapest, a spinoff of the family holding KURT Information Security and Data Recovery Group.

Stuart May, CFBA, CFWA, is an associate at Coutts & Co. in London.

Ken McCracken, program committee chair, is an FFI Fellow and the head of family business consulting at KPMG in the UK.