

FFI ON FRIDAY | NOVEMBER 17, 2017  
PREPARED EXCLUSIVELY FOR FFI MEMBERS



# Organizational Members – Concluding Our 2017 Series

## FFI



In our concluding issue featuring the 2017 FFI organizational members, we are pleased to profile the final organizations in this esteemed group.

There are 65 organizational members in FFI — leaders in the field and active in the organization. Thanks to them all for their leadership in the field and their support of FFI in 2017.

## ORGANIZATIONAL MEMBERS

### Attorneys for Family-Held Enterprises (afhe)



**Attorneys for Family-Held Enterprises (afhe)** is an independent, non-profit association of attorneys practicing in the areas of corporate, litigation, taxation, and trusts and estate, who provide multi-disciplinary legal counsel and advice to publicly and privately-held enterprises, their owner-managers, and family members. More than 100 members of afhe are also members of FFI and include 25 certificate holders, 15 of which are FFI Fellows. The current leaders of afhe are **Andrew N. Karlen** (FFI Fellow, president); **Michael Whitty** (FFI Fellow, treasurer); and **Mark E. Kellogg** (secretary).

The 2018 afhe Annual Conference & Membership Meeting will be held from April 18–April 20, 2018 in Litchfield Park, AZ.

[CLICK HERE FOR MORE INFORMATION](#)

### de Visscher & Co.



**de Visscher & Co.** has been a trusted financial advisor to family businesses around the world for more than 25 years. de Visscher & Co. assists its clients in developing and analyzing financial solutions for the liquidity needs of the shareholders, the capital needs of the business or both while designing highly effective family and corporate governance structures to assure the long-term sustainability of the family wealth across generations. FFI members are **François M. de Visscher**, (FFI Fellow, 2003 Richard Beckhard Practice Award recipient and former board president), **Jamie Gerard**, **Terry Hannafin** (CFBA) and **Kim Lemone**.

Read “SFOs Evolve as the Landscape Changes,” in the August issue of *Trusts & Estates*, which features comments by François.

[READ ARTICLE](#)

Check out François’ interview in *FFI Practitioner*, with Paul Carbone, managing partner of Pritzker Group Private Capital.

[READ INTERVIEW](#)

## Delaware Valley Family Business Center



**Delaware Valley Family Business Center** has been guiding multi-generation business families through their complex, unique journeys since 1988. The center has served more than 600 business families and its customized, inter-generational team-building process provides the direction, confidence and tools to overcome the dangers, beat the odds, and reach the summit for the family and the business. FFI members are **Jared Byas** (CFBA, CFWA and GEN Faculty), **Sally Derstine** (FFI Fellow), and **Scott Hackman** (CFBA).

Read Sally's recent blog, "Stepping into Discomfort: Lessons learned from smashed fingers."

[READ BLOG](#)

## Deloitte & Touche LLP (Singapore)



**Deloitte & Touche LLP (Singapore)** serves clients in Southeast Asia as a dedicated advisor who will get to know the family and its business and help the client on its journey of value creation and wealth preservation to ensure the family legacy is passed on through generations to come. FFI members are **Chee Chong Tam** (CFWA, ACFBA), **Catherine Chow** (CFBA, CFWA), **Cheryl Khor**, **Richard Loi** (CFBA, CFWA), **Carrie Ng** (CFBA, CFWA), and **Koh Soon Bee**.

Read "Deloitte Private Southeast Asia: The future is now. Journey with us."

[READ ARTICLE](#)

## Royal Bank of Scotland (RBS)



**Royal Bank of Scotland (RBS)** was founded as a corporation by royal charter in Edinburgh in 1727. Together with NatWest and Ulster Bank, RBS provides banking facilities throughout the UK and Ireland. There are 35 current FFI members among the professionals from RBS, NatWest and Ulster Bank, 25 of whom are GEN certificate holders.

Read the recent article, “NatWest Great British Entrepreneur Awards Recognise the Power of Family Businesses.”

[READ ARTICLE](#)

## The Family Business Consulting Group, Inc.



**The Family Business Consulting Group, Inc.** serves families and the enterprises that they have built by guiding them through the process of building structures, systems and skills for comprehensive strategy, better decision making, stronger competitive advantage, and continuity of enterprises for future generations. Among the FBCG FFI members are five FFI Fellows (**Craig Aronoff, Barbara Dartt, Michael Fassler, Debra Houden, and Drew Mendoza**), and five FFI award recipients: **Richard Beckhard Practice Award (Craig Aronoff, 1997; Stephen McClure, 1999; Drew Mendoza, 2017); Best Doctoral Dissertation Award: (Christopher Eckrich, 1994; Joshua Nacht, 2016).**

Many thanks to Craig for his keynote at the 2017 R&E Symposium. Go here for an interview with him in the November 15 edition of *FFI Practitioner*.

[READ ARTICLE](#)

# Wells Fargo Private Bank



**Wells Fargo Private Bank** meets the needs of each client through multidisciplinary teams of local specialists dedicated to understanding, analyzing, and evolving an integrated wealth plan that addresses both quantitative and qualitative issues. Wells Fargo Family Dynamics Consultant Services creates safe spaces for families to connect and reflect as well as cultivate a range of interpersonal and technical skills, transparent processes, protocols, and structures that promote thoughtful decision-making. FFI members are **Katherine Dean**, **Suzanne Mansell**, **Natalie McVeigh** (CFWA, ACFBA, GEN Faculty and leader of the Next Gen VSG), **Gary Shunk** (CFBA, CFWA), and **Thomasina H. Williams** (CFWA, ACFBA).

Read Katherine's blog, "Stop Pushing My Buttons! Family Tensions Can Prevent Forward Planning."

[READ BLOG](#)

## FFI ORGANIZATIONAL MEMBERS

**FFI organizational members are from Africa, Asia, Australia, Canada, Europe, Latin America, UK and USA.**

[VIEW COMPLETE LISTING](#)

If you have four or more people in your organization who are or would like to be members of FFI, organizational membership may be for you. Contact Amanda Walker, Membership Director at [amanda@ffi.org](mailto:amanda@ffi.org).

COMING SOON

The FFI members only app,  
Social Link

