

FFI ON FRIDAY | AUGUST 31, 2018  
PREPARED EXCLUSIVELY FOR FFI MEMBERS



# Special Events at the London Conference



In addition to the stimulating sessions featured earlier in FFI on Friday: we want to make you aware of Special Events that will be held during these stimulating three days.

## WEDNESDAY, OCTOBER 24

### Pre-conference Courses — 9:00AM-4:00PM

#### **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*

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 skills 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.*

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

## Opening Reception — 5:30PM-7:30PM

Step right up to the greatest festival in the family enterprise field! Attendees will spend this social evening connecting with colleagues old and new at our FFI Embankment Festival grounds at the Park Plaza River Bank. This spectacular event will feature all sorts of surprises—including festival performers, magic, art and more. Festival goers will get a preview of what is in store throughout the conference and meet our artist-in-residence Mark Bagnall.



Mark Bagnall

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THURSDAY, OCTOBER 25

## Global Education Network (GEN) Awards Breakfast — 7:30AM-9:00AM

Join your colleagues to recognize and congratulate GEN certificate program graduates, new FFI Fellows, and GEN scholarships recipients. GEN faculty chair Carlo Salvato will MC.

**Pilar Tolentino**, Carmen Bianchi Family Business Associates Scholarship; **Camille Crofton Cherry**, Crystal & Company Scholarship; **Navneet Bhatnagar**, de Visscher & Co. Scholarship; **Javier Macias**, Fitzpatrick & Francis Family Business Continuity Foundation Scholarship; and **Mohar Yusof**, Waesche Family Scholarship.

MANY THANKS TO THE GEN SCHOLARSHIP SPONSORS FOR 2018!

## Lunch and Learn Sessions — 12:30PM-2:00PM

### LGBTQIA Issues in Family Enterprise Advising

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

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.



**Kyle Danner**

## **Mental Health? Addiction? Help is at Hand.**

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

Join this informal conversation to help you assist your clients navigate the complex world of treatment options.



**Ed Levin**



**Mark Burdick**

## **Global Research Report of Findings on Family Enterprise**

*Presenters: Helena Robertsson and Marnix van Rij, EY Global Family Business Center of Excellence*

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



**Helena Robertsson**



**Marnix van Rij**

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**FRIDAY, OCTOBER 26**

**Fellows & GEN Alumni Breakfast (By Invitation Only) —  
7:30AM-9:00AM**

*Special guests and presenters: The El Agamy Family, recipients of the 2018 FFI International Award*



**FFI Annual Meeting — 1:00PM-1:30PM**

Hear reports, updates, and join in thanking outgoing board members: Patricia Annino, Rodolfo Paiz, Adib Rashid, and Jamie Weiner. David Harvey, FFI board chair will preside.



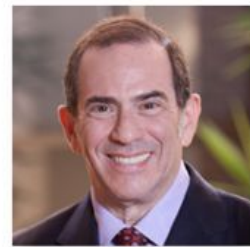
**Patricia Annino**



**Rodolfo Paiz**



**Adib Rashid**



**Jamie Weiner**



# 2018 Awards Ceremony & Closing Festivities — 4:30PM–6:30PM

Mark the end of the London conference by celebrating the 2018 FFI Award recipients and enjoying a spectacular and unique festival at the Park Plaza Riverbank. We will be joined by some of London's most unusual and memorable talents—the lineup includes musical acts, performance artists, circus performers (that may or may not include juggling FFI members!) and more. It is an award ceremony celebrating innovation, creativity and diligence!

## *This year's award winners are:*

### Academic & FBR

Jeroen Neckebrouck, Best Doctoral Dissertation; Kimberly A. Eddleston, Franz Kellermanns, Kristen Madison, Gary N. Powell, Best Unpublished Research Paper; Daniel Holt, Franz Kellermanns, Kristen Madison, Best *FBR* Article; and Hanqing Fang, *FBR* Outstanding Reviewer.

THANKS TO RELATIVE SOLUTIONS, LANSBERG, GERSICK & ASSOCIATES,  
AND RESOURCE MANAGEMENT, INC. FOR THEIR SPONSORSHIP OF THE  
ACADEMIC AND *FBR* AWARDS.

### Achievement

Caro Rock, Barbara Hollander Award; Kirby Rosplock, Richard Beckhard Practice Award; Andrew Keyt, Interdisciplinary Award; and the El Agamy Family: Hischam, Antoinette, Ramia, Farida, and Shereen El Agamy, International Award.

THANKS ALSO TO CAMBRIDGE ADVISORS TO FAMILY ENTERPRISE,  
FIDELITY CHARITABLE, KEYT CONSULTING, KPMG, AND TRUSTED  
FAMILY FOR THEIR SPONSORSHIP OF THE 2018 CONFERENCE.

We will also Kick-Off to the 2019 conference in Miami and close with a social reception and opportunity to meet the performers and congratulate the award winners. Festival attire welcome but not required!

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## For earlier editions on the conference go to:

On the Main Stage in London, On Stage in London: FFI Academics, So What Can You Expect from a Festival, and A Festival of the Classics.



# FFI Global Conference

## Join the 2018 FFI Embankment Festival!

Don't wait – register today!

Make hotel reservations at the FFI special rate – which expires on September 18.

[REGISTER](#)

[HOTEL RESERVATIONS](#)

Don't forget to cast your vote in the 2018 FFI board of directors elections.

[VOTE HERE](#)