

FFI ON FRIDAY | DECEMBER 14, 2018
PREPARED EXCLUSIVELY FOR FFI MEMBERS



Featuring the FFI
Organizational
Members –
Concluding the
2018 Series



In our concluding issue featuring the 2018 FFI organizational members, we are pleased to profile another esteemed group – leaders in the field and active in the organization.

Thanks to them and to all the FFI organizational members for their leadership in the field and their support of FFI in 2018.

Attorneys for Family-Held Enterprises



AFHE's (Attorneys for Family-Held Enterprises) mission is to be the leading resource for the on-going advancement, collaboration and education of practicing attorneys and other professionals who provide multi-disciplinary counsel to family-held enterprises. Nearly 100 members of AFHE are members of FFI, including 15 Fellows, 12 Certificate holders, and several FFI award winners. Andrew Karlen, FFI Fellow, is the president of AFHE; Michael Whitty, FFI Fellow, is vice-president and treasurer; and Mark Kellogg is secretary.



Andrew Karlen



Mark Kellogg



Michael Whitty

Save the date for the annual AFHE conference, which will be held May 1-3, 2019 in Houston, TX.

CFAR



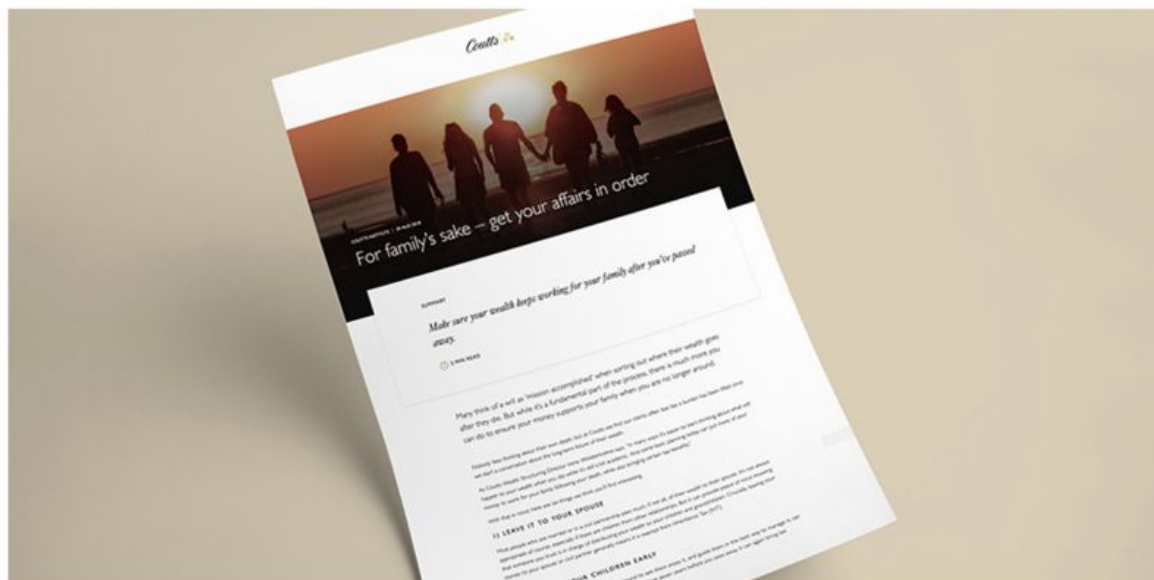
CFAR began as a research center inside the Wharton School, was established as a private management consulting firm in 1987, and began studying and working with family firms in the early 1980's. The firm combines a deep understanding of business and performance with sophisticated insights into people and organizations. Consultants integrate their academic expertise in diverse disciplines with pragmatic ways to help leaders solve new or stubborn organizational problems. FFI members are Debbie Bing, FFI Fellow and secretary of the board of directors; Cathy Brundage; Nancy Drozdow, FFI Fellow, founding FFI member and recipient of the 2012 Richard Beckhard Practice Award; Jessica Geiben Lynn, CFBA; Katelyn Husereau, CFBA; and Caleb White.

Coutts & Co.



Coutts & Co. has a 300-year history of working with families in business, focusing on the contribution these companies make to global economies and societies. The Coutts Institute provides business families with advice and expertise on themes such as family governance, ownership succession, and leadership development. FFI members are Rachel Harrington, CFBA, CFWA; Stuart May, CFBA, CFWA, member of the 2018 FFI global conference program committee; Lenka Setkova, CFBA, CFWA; and Irene Wolstenholme, CFWA.

Read [“For family’s sake – get your affairs in order”](#) by Irene Wolstenholme.



Crystal & Company

**CRYSTAL
& COMPANY**

An Alliant Company

With a dedication to advising family firms, **Crystal & Company** is a family enterprise built on more than 80 years and three generations of family ownership and management. FFI members are Linda Bourn, FFI Fellow and former FFI board member; Jonathan Crystal; Paul Funk; Frank Harrington; and Tanis E. Perez.

Frank Harrington and Tanis Perez are members of the Program Committee for the 2019 global conference in Miami.



Linda Bourn



Camille Crofton Cherry

Congratulations to Linda Bourn, who became an FFI Fellow in London and to Camille Crofton Cherry who received the 2018 Crystal & Company GEN scholarship.

Delaware Valley Family Business Center


Delaware Valley
FAMILY BUSINESS CENTER

Delaware Valley Family Business Center (DVFBC) 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; Sally Derstine, FFI Fellow; and Trina Stutzman, CFBA.

DVFBC's Family Business Mini-Conference, "Creating & Leaving a Legacy of Meaning," will be held on March 15, 2019 in Villanova, PA. [View more information.](#)

de Visscher & Co.



de Visscher & Co. has been a trusted advisor to family businesses around the world for more than 25 years. 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. Many thanks to de Visscher & Co. for founding the FFI Global Education Network (GEN) scholarship program in 2011. Recipients since then have been Navneet Bhatnagar (2018); Cinzia Dessi (2017); Abdullahi Jubril Saba (2016); Pilar Tolentino (2015); Christian Schiede (2014); Anthony Devine (2013); Louisa Brunner (2012); and Jacek Lipiec (2011).



Navneet Bhatnagar



François M. de Visscher

Jönköping International Business School



Jönköping International Business School (JIBS) first enrolled students in 1994. The school's **Centre for Family Enterprise and Ownership (CeFEO)**, inaugurated in November 2005, is a centre for research and learning uniquely devoted to family business and ownership issues. A leading idea of CeFEO and its activities is to combine academic excellence and practical relevance. Jönköping members are Massimo Bau; Ethel Brundin; Leif Melin, FFI Fellow, former board member, and recipient of the 2012 International Award; and Mattias Nordqvist, FFI Fellow, director of the CeFEO, and recipient of the 2005 and 2011 Best Unpublished Research Paper Awards.

REGENERATION



REGENERATION has focused on supporting family businesses for more than 20 years. The firm helps clients to increase business and wealth while strengthening their families. Founder and managing partner James Olan Hutcheson is an FFI Fellow, former board member, and the recipient of the 2009 Richard Beckhard Practice Award. Other FFI members are Amy Campbell; Elle Hansen, FFI Fellow and chair of the Family Enterprise Case Competition Committee; and Mary Ann Zimmerman.

Relative Solutions LLC



Relative Solutions LLC is a strategic partner with families as they manage changes such as generational transitions in their family enterprise. Whether working with a family on the meaning and impact of wealth, or on issues of governance, strategic planning, and philanthropy, the firm helps families to achieve their stated goals. FFI members are Carolyn Greenspon, Rebecca Meyer, Karen Pursley, and FFI founding member Fredda Herz Brown. Fredda is also an FFI Fellow, recipient of the 1996 Barbara Hollander Award, the 2002 Richard Beckhard Practice Award, and a mentor in the GEN program.

Read her recent article for *Forbes*, "[A Focus On Learning – An Essential Element In A Resilient Family.](#)"



Fredda Herz Brown



Jeroen Neckerbrouck

Thanks to Relative Solutions for its long-time sponsorship of the FFI Best Dissertation Award, presented this year to Jeroen Neckerbrouck.

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 FBCG's FFI members are six FFI Fellows: Craig Aronoff, Barbara Dartt, Michael Fassler, Jean Meeks-Koch, Drew Mendoza, Wendy Sage-Hayward; David Karofsky, CFBA, CFWA; and four FFI award recipients: Richard Beckhard Practice Award—Craig Aronoff, 1997; Stephen McClure, 1999; Drew Mendoza, 2017; Best Doctoral Dissertation Award—Christopher Eckrich, 1994.

Read "[Good Governance for Family and Business Success](#)" by Michael Fassler and Otis Baskin.



Wilmington Trust



Wilmington Trust family office services are designed for families with complicated wealth management concerns that cross multiple disciplines and generations. Through the Family Wealth Sustainability Process, the firm helps families understand pitfalls and best practices; assess unique family preferences, communication, and styles; align family members' expectations; and assemble a comprehensive plan. FFI members are Al Behar, Donald DiCarlo, Fred Hopkins, Matt Panarese, and Marguerite Weese.

Read **"Holistic Planning for Family Business Owners,"** by Donald DiCarlo.



FFI ORGANIZATIONAL MEMBERS

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

[VIEW COMPLETE LISTING](#)

In case you missed the previous editions featuring our organizational members, here they are:



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 Lenny Fogel at lenny@ffi.org.

Get Listed in the Consultants & Speakers Directory

As a member of FFI, you have the unique opportunity to be listed on the newly redesigned FFI.org. The [FFI Consultants & Speakers Directory](#) is the global resource for connecting educational and professional organizations, members of the media, as well as family office and family business members with commentators, meeting and seminar speakers, professional advisors and experts in the family enterprise field. Take advantage of the opportunity to be found quickly and easily with a profile in the FFI Consultants & Speakers Directory.

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FFI GLOBAL CONFERENCE MIAMI 2019

We are now seeking proposals for the 2019 FFI Global Conference in Miami October 23rd to 25th. Deadline for submissions is January 15, 2019 at midnight Eastern.

[LEARN MORE & SUBMIT](#)