

FFI ON FRIDAY | JULY 27, 2018
PREPARED EXCLUSIVELY FOR FFI MEMBERS

A Festival of the Classics



Just in case you think we've ignored the classic topics for an FFI conference, here are some topics that are always relevant.

CONSULTING

Celebrating the Practitioner's Spectrum

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.

Presenters



Elle Hansen
REGENERATION



Steve Legler
Shift Your Family
Business



Natalie McVeigh
Wells Fargo Private
Bank



Mairi Mickel
Mairi Mickel's
Business Families

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

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).

Presenter



Pilar Tolentino
Ateneo Family Business
Development Center



GENDER

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

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.

Presenter



Linda Salim

Sustainable Family Business
Planning & Consulting

Trigger Happy? Solo as “The New Coming Out”

How have intergenerational triggers diminished our capacity for intimate romantic relationships? Individuals choosing to be “Solo,” has reached epidemic levels worldwide, across all demographics and socio-economic groups, and is continuing to increase. This session will provide strategies for families and advisors to navigate this under-reported phenomenon.

Presenter



Louise Levin

Louise Levin
Associates/Screaming Non
Sequitur Productions

GOVERNANCE

Aligning Long-Term Incentive Compensation

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.

Presenters



Trish Botoff
Botoff Consulting



James Coutre
Fidelity Family
Office Services

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

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.

Presenters



Devin DeCiantis
Lansberg, Gersick &
Associates LLC



Nicolas Hollanders
Lansberg, Gersick &
Associates LLC



Ivan Lansberg
Lansberg, Gersick &
Associates LLC

Transitioning Voting Shares: Making clarity out of chaos

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

Presenters



Dan Frosh
Frosh Family
Business
Consulting



Henry Hutcheson
Family Business
USA

PHILANTHROPY

Engaging Families with Philanthropy

How do you transition intangible assets? Learn how to use theatrical techniques and discussions on philanthropy as tools to transition intangibles such as values, family history, and personal experiences. Discussing values and money may not always be a comfortable conversation. Discussing philanthropy is a useful tool to begin these conversations.

Presenters



Anne Hennessy
PNC Center for
Financial Insight



Mindy Rosenthal
PNC Center for
Financial Insight

Should Anything Last Forever? Considerations in time horizons for family businesses and family giving

Family interests can evolve and diverge over time, and that divergence can impact the business, philanthropy, and family legacy. Hear from Rockefeller family members on how they addressed this challenge and used it to propel the family to new heights.

Moderator



Donzelina Barroso
Rockefeller Philanthropy
Advisors

Add that to **Main Stage, Academics, Festival Themes** and you have a program not to be missed. Please see below for details and to register.

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SUMMER READING

Giving New Meaning To The Term "Next Gen Advisory"

What does the future hold for family business advising? Campden FB has recently published an article by FFI president, Judy Green, PhD, exploring how some evolving trends may impact the next generation of family business advisers.

Built for busy professionals, FFI GEN delivers world-class curriculum, unparalleled access to faculty and thought leaders, and connections to a global network of specialists in the field. Want to take your skills to the next level? Q3 enrollment is now open.

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