



# FFI Global Conference

## London 2018, October 24-26

Park Plaza Riverbank, 18 Albert Embankment, London

[SCHEDULE](#)

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## **Join the 2018 FFI Embankment Festival!**

**Camp out on the Thames for three days as you challenge and joust with your intellectual and personal best self at this festival of ideas and activities that will improve your understanding of yourself and the modern day family enterprise field.**

Festivals are many things around the world. They can be community events to recognize and celebrate unique traditions. They can be expressions of art and demonstrations of talent. They can be challenges to think outside of the box and experiment with something new. You'll find all of this and more in London in October.



# SCHEDULE

**October 24-October 26**

WEDNESDAY

THURSDAY

FRIDAY



# Wednesday, October 24, 2018

## 9:00AM - 4:00PM PRE CONFERENCE SESSIONS

### 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

**Location:** Plaza 6-7

#### Description

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 skill for critical analysis will underpin all elements of the day.

### GEN 504 Philanthropy: More than Money

**Faculty:** Jim Coutre, Fidelity Family Office Services; Maya Prahbu, Coutts & Co.

**Location:** Plaza 1-2

#### Description

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

*\*These two courses partially fulfill the requirements for Advanced GEN Certificates. Visit [ffigen.org](http://ffigen.org) for more details on the GEN program.*

## 12:00PM - 1:30PM

### Board Lunch

**Location:** City Suite 3

**1:30PM - 4:00PM**

**Board Meeting**

**Location:** Plaza 4

**1:30PM - 4:30PM**

**Iberoamerica Meeting**

**Location:** Plaza 3

**5:30PM - 7:30PM**

**OPENING RECEPTION**

**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!

**Location:** City Suite all

**Thursday, October 25, 2018**

**7:30AM - 9:00AM**

**Global Education Network Awards Breakfast**

**Location:** City Suite all

**Description**

Join colleagues to recognize and congratulate GEN certificate program graduates, new FFI Fellows, and GEN scholarships recipients.

**9:30AM - 10:30AM**  
**CONCURRENT SESSIONS**

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

**Presenters:** Devin DeCiantis, Nicolas Hollanders, Ivan Lansberg, Lansberg, Gersick & Associates LLC

**Location:** Plaza 1-3

### Description

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.

## A Visit to the Festival Fortune Teller: Forecast of three future trends for family-owned enterprises

**Presenter:** Patricia Annino, Rimôn P.C.

**Location:** Plaza 6-7

### Description

This session will address forecasting future trends: a) you can't litigate love (so why are you trying?) – there will be increased litigation dealing with succession and control issues; b) evolving succession challenges in a seven-generation world; and c) increasing the visible (formerly invisible) power of women as family members, on boards and as in-laws.

## The Power of Contracting

**Presenters:** Judi Cunningham, Kennesaw State University; Wendy Sage-Hayward, The Family Business Consulting Group

**Location:** Plaza 9-10

### Description

Contracting is an often overlooked, but critically important, element of engaging and working with family enterprise clients when contracting with multiple family members in complex and sensitive landscapes. This session explores contracting best practices to avoid pitfalls that often result when contracting is done poorly.

### ON THE MAIN STAGE

## The Diversity of Deviance: How breaking the rules can hurt (and help) families and family firms

Deviant behavior has different antecedents and effects based on variation in family systems and family firms. Using lecture and small group discussion, this session outlines the diversity in types and outcomes of

deviance and provides attendees with the means to use deviance in the family and family firm to improve performance.

**Presenters:** Kim Eddleston, Northeastern University; Roland Kidwell, Florida Atlantic University

**Location:** Ballroom 1 (Main Stage)

**10:30AM – 11:00AM**

## Hospitality Break

**11:00AM – 12:30PM**  
**CONCURRENT SESSIONS**

### Artistic Engaged Scholarship: Creative art labs on family business

**Presenters:** Jane Glover, Kiran Trehan, University of Birmingham

**Location:** Plaza 9-10

#### Description

This presentation introduces the notion of 'artistic engaged scholarship' and discusses the challenges in communicating research and delivering impact. Participants will be asked to explore a number of artistic exhibitions before the end of the session with an interactive discussion on participants' thoughts and what they learned from the session.

### Celebrating the Practitioner's Spectrum

**Presenters:** Elle Hansen, REGENERATION; Steve Legler, Shift Your Family Business; Natalie McVeigh, Wells Fargo Private Bank; Mairi Mickel, Mairi Mickel's Business Families

**Location:** Plaza 6-7

#### Description

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.

### To Share or Not to Share: How will the shared economy impact the field of family business?

**Presenters:** Giana Eckhardt, University of London; Andrew Keyt, Loyola University Chicago; Domingo Such, Perkins Coie

**Location:** Plaza 1-3

### Description

Airbnb, Uber, Zipcar—the shared economy is disrupting industries across the world. This session will look at the basic principles of the shared economy and engage with the audience to explore the potential for the shared economy to disrupt the field of advising family businesses.

### ON THE MAIN STAGE

#### Organized Improv: Optimizing team development for team productivity

This session will feature insights regarding two specific team development models with the FFI adviser community, in the hope that exposure to a set of ideas that may be quite different from current technical expertise will help provide even more value to clients.

**Presenter:** Jessica Geiben Lynn, CFAR — joined by artist-in residence **Mark Bagnall**

**Location:** Ballroom 1 (Main Stage)

### 12:30PM - 2:00PM LUNCH & LEARN

#### Faculty Meeting

**Location:** City Suite 3

#### General Lunch

**Location:** City Suite 1

#### LGBTQIA Issues in Family Enterprise Advising

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

**Location:** Plaza 4

### Description

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.

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

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

**Location:** Plaza 8



#### Description

Ed Levin, LICSW and Mark Burdick, PhD facilitate an informal conversation to help you assist your clients navigate the complex world of treatment options.

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

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

**Location:** City Suite 2

#### Description

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

### **2:15PM - 3:15PM CONCURRENT SESSIONS**

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

**Presenter:** Linda Salim, Sustainable Family Business Planning & Consulting

**Location:** Plaza 6-7

#### Description

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.

### **Jousts, Feats of Strength and Games of Chance: Common causes and outcomes in family-owned business legal disputes**

**Presenter:** Michael Connolly, Murtha Cullina LLP

**Location:** Plaza 9-10

#### Description

Family-owned business legal disputes are often disruptive, time-consuming, and expensive. Such disputes typically arise from disagreements involving Paper (documents), Process (decision-making), or People (dynamics among stakeholders). Join this discussion to explore these three common flashpoints, to learn the various outcomes, and to learn ways to avoid or mitigate these disputes.

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

**Presenter:** Donzelina Barroso, Rockefeller Philanthropy Advisors

**Location:** Plaza 1-3

#### Description

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.

#### ON THE MAIN STAGE

### Shakespeare and Family Business: To be or not to be?

William Shakespeare is commonly described as a “writer for all ages.” His work endures because it speaks to the human experience. This presentation explores and examines Shakespearian themes that might be usefully applied to working with—and in—family businesses.

**Presenter:** Lloyd Steier, University of Alberta School of Business — joined by artist-in residence **Mark Bagnall**

**Location:** Ballroom 1 (Main Stage)

**3:15PM – 3:30PM**

### Hospitality Break

**3:30PM – 5:00PM**  
**CONCURRENT SESSIONS**

### Celebrating the Past, Writing the History of the Future

**Presenters:** Christine Blondel, INSEAD; David Bork, Family Business Matters; Rania Labaki, EDHEC Business School

**Location:** City Suites 1-3

#### Description

The session contributes to the festival of family business ideas through a celebration of 50 years of research and practice, with a particular focus on the experience of David Bork. We engage in a reflection with the audience to shape the future on how best we can serve family businesses.

**ON THE MAIN STAGE**

**Mixing in Royal Circles**

An impromptu 'in the round' play of two family council meetings will be facilitated. Characters, played by delegates, respond to interventions and guidance of a role-playing family business adviser. There will be learning reviews between and a final review at end for 'takeaway' learnings.

**Presenter:** Susan Kaye, The Challenge of Excellence Ltd. — joined by artist-in residence **Mark Bagnall**

**Location:** Ballroom 1 (Main Stage)

**6:30PM**

**Dinner On Your Own**

**6:30PM - 8:00PM**

**Speakers and Sponsors Reception**

(BY INVITATION ONLY)

**Location:** KPMG



# Friday, October 26, 2018

**7:30AM – 9:00AM**

## **General Breakfast**

**Location:** City Suite 2-3

## **Fellows & GEN Alumni Breakfast**

(BY INVITATION ONLY)

**Location:** City Suite 1

**9:15AM – 10:15AM**  
**CONCURRENT SESSIONS**

## **Aligning Long-Term Incentive Compensation**

**Presenters:** Trish Botoff, Botoff Consulting; Kirby Rosplock, Tamarind Partners Inc.

**Moderator:** Jim Coutre, Fidelity Family Office Services

**Location:** Plaza 1-2

### **Description**

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.

## **Family Offices, Fiefdoms, Fallacies, and Fables**

**Presenters:** Tony Bogod, Tim Carvosso, Resonance Partners LLP.

**Location:** Plaza 6-8

### **Description**

This interactive workshop examines the world of the family office, raising questions like: What is a Family Office really? How do you measure success? What do Family Offices do well –or badly? What are common pitfalls to look out for when working with Family Offices, whether from within or without?

## **Rites of Passage in a Land of Giants**

**Presenter:** Jamie Weiner, Inheriting Wisdom

**Location:** Plaza 3-4

### Description

Born into a world of giants, emerging adults struggle with growing up in the “shadow.” Redefining “rites of passage” creates a path for rising generations to emerge into productive relationships between generations. Participants will actively explore “rites of passage” stimulated by the voices of rising generation family members.

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

**Presenter:** Pilar Tolentino, Ateneo Family Business Development Center

**Location:** Plaza 9-10

### Description

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).

**10:15AM - 10:45AM**

## Hospitality Break

**10:45AM - 12:15PM**  
**CONCURRENT SESSIONS**

## Engaging Families with Philanthropy

**Presenters:** Anne Hennessy, Mindy Rosenthal, PNC Center for Financial Insight

**Location:** Plaza 6-8

### Description

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.

## Socratic Dialog: A revolutionary tool for business families

**Presenters:** Alberto Gimeno, ESADE Business School and Socratic Dialog Institute

**Location:** Plaza 1-2

### Description

In this workshop, participants will be exposed to a revolutionary new insight and methodology: Socratic Dialog. After a short explanation of the basic elements that define Socratic Dialog, participants will experience, on a practical level, the enormous possibilities that this methodology offers to develop healthy and competent business families.

## **The Mirror Maze: Changing your reflection**

**Presenter:** Kirsten Taylor-Martin, Grant Thornton Australia, Ltd.

**Location:** Plaza 9-10

### Description

Mirror, mirror on the wall, who is the most diverse of them all? Take time to reflect and be challenged by the power of diversity of thought. This interactive session will showcase the power of diversity in Australian family businesses. Come and join in the fun!

## **The Healing Mandala™: Mindfulness, art, & appreciative storytelling**

**Presenters:** Laura Allen, Jean Meeks-Koch, Positively People, LLC.

**Location:** Plaza 3-4

### Description

This session will look at a methodology for families to come together and share individual realities, seek forgiveness, and embrace healing. This approach provides a construct that draws from the past, anchors emotions in the present, and provides a way for families to engage in healing.

**12:15PM – 1:30PM**

## **General Lunch**

**Location:** City Suite 1-3

**1:00PM – 1:30PM**

## **Annual Meeting**

**Location:** Plaza 3-4

**1:30PM – 3:00PM**

**CONCURRENT SESSIONS**

## **Developing Ethical Practices to Foster Family Harmony**

**Presenters:** Anne Hennessy, Mindy Rosenthal, PNC Center for Financial Insight

**Location:** Plaza 1-2

#### Description

Drawing on the 200-year-old practice of Mussar, this interactive session will teach ways to help families engage and empower themselves and others. Participants will be introduced to this unique tradition and learn to identify how they relate to themselves and others through exercises and examination of ethical traits.

### **The Generative Alliance: Culture and evolution of 100-year family enterprises**

**Presenters:** Dennis Jaffe, Wise Counsel Research; Alex Scott, Sandaire; Andrew Wates, Wates Group

**Location:** Plaza 6-8

#### Description

This session will share stories from two family leaders and a research study about cross-generational evolution of global 100-year family enterprises. We explore the generative alliance that integrates family stakeholders, including stewards concerned with legacy and culture, craftsmen creating a disciplined business structure, and opportunists seeking innovative opportunities and new pathways.

### **Transitioning Voting Shares: Making clarity out of chaos**

**Presenters:** Dan Frosh, Frosh Family Business Consulting; Henry Hutcheson, Family Business USA

**Location:** Plaza 9-10

#### Description

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

#### **ON THE MAIN STAGE**

### **Unmasking Imagination and Creativity: A mask-making workshop to explore how creativity can mediate family business solutions**

Join a mask-making workshop to explore how creativity can mediate family business solutions. The ancient human custom of mask-making can empower all generations of a business family. By examining emotions, values and identity, creativity and imagination can be unlocked to create opportunity.

**Presenters:** Charlotte Dillon, RoundTable Global; Oliver Hallam, Oliver Hallam Mediation

**Location:** Ballroom 1 (Main Stage)

**3:15PM – 4:15PM**

**CONCURRENT SESSIONS**

## A Jane Austen Festival for Family Firms and Advisers

**Presenter:** Michael Whitty, Handler Thayer LLP

**Location:** Plaza 1-2

### Description

This session will offer examples from the life and novels of Jane Austen to illustrate timeless lessons for business families and their advisers, including different forms of family capital, succession planning, and addressing demographic realities.

## Trigger Happy? Solo as “The New Coming Out”

**Presenter:** Louise Levin, Louise Levin Associates/Screaming Non Sequitur Productions

**Location:** Plaza 9-10

### Description

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.

## The Jousting between the Family and the Business Needs. Who will win?

**Presenters:** Luis Jimenez Castillo, WPI/Universidad Panamerica

**Location:** Plaza 6-8

### Description

Balance between the family and the business is important for the sustainability of the family business. The intersect between rationality and emotions creates the perfect arena for a battle between the business's profitability and family's prerogative. This session will simulate difficult situations where participants have to choose the best scenario.

## Welcome to the Culture Fair: Ethnographic methods to make the strange familiar

**Presenter:** Debbie Bing, CFAR

**Location:** Plaza 3-4

### Description

This hands-on workshop will demonstrate an ethnographic approach to consulting – built on anthropological observation methods and developed through years of practice – and will explore how it can provide another way of joining with and ultimately helping a family.



**4:30PM - 6:30PM**  
**CLOSING AWARDS**

**2018 Awards Ceremony & Closing Festivities**

**Location:** Ballroom 1&2

## **REGISTRATION INFORMATION**

**REGISTER NOW**



**2018 CONFERENCE PRESENTERS AND PROGRAM  
COMMITTEE**

**VIEW ALL**



## **HOTEL BOOKING INFORMATION**

**BOOK NOW**



## **FROM OUR ATTENDEES**

**“As a learning and sharing organization, FFI is just extraordinary. You have to go to one of its meetings to understand the generosity with which the members share their experiences and perspectives.**

**A beacon of best practice in terms of professional collaboration and interaction.”**

**ALEX SCOTT**

CHAIRMAN SANDAIRE

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