

FFI ON FRIDAY | **SEPTEMBER 28, 2018**
PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the FFI Organizational Members – Part V



Welcome to the fifth in a series of issues featuring the distinguished organizations and educational institutions that are FFI organizational members.

Advantis Broker



Advantis Broker was founded in Bosnia & Herzegovina in 2007. The firm is an investment banking boutique, offering investment advisory services, as well as helping clients—especially family companies—to build better corporate governance within those companies. FFI members are Branko Kecman, Dragoslav Pajić, and Milkića Ećim Panić.



Branko Kecman is a founder of Advantis Broker.

Clere Consulting



Clere Consulting is a valuable resource for family business leaders and their advisers seeking to transition the next generation into positions of responsibility. Given the breadth of the firm's background in addiction and behavioral health, as well as the team's experience and knowledge of family business systems and dynamics, Clere provides family businesses with effective solutions to achieve their succession goals. FFI members are Samuel Dresser; Doug Lyons, CFBA; Amy Prouty; and Eve Ruff.

View the [Clere Glossary of Addiction Terms](#).



Read Sam Dresser and Bill Messinger's co-authored white paper entitled *Demise of Trustee Discretion*.

DanQ International



DanQ International is supported by professional experts from the United States, Canada, Australia, Singapore and offshore areas, helping China's entrepreneurs and global Chinese families by providing family internationalization and family governance, protection, and inheritance of comprehensive planning services, recognition of family wealth enterprises and the spirit of the family inheritance from generation to generation. In the past few years, DanQ International has furthered the education of 13 individuals who now hold dual certificates in the FFI GEN program.



Janet Zhang, CFBA, CFWA, is the chief advisor for DanQ's Family Globalization & Succession Research Institute Ltd.

Deloitte LLP

The Deloitte logo, consisting of the word "Deloitte" in a bold, black, sans-serif font, followed by a small green dot.

Deloitte LLP Family Enterprise Consulting (FEC) team works with family enterprises to help them flourish across generations, both from a commercial and a relationship perspective. FEC takes a family enterprise system view, which involves working with the three dimensions of family, ownership, and enterprise, and how they interrelate. Deloitte's more than 20 FFI members come from around the globe. Peter Leach is a partner in Deloitte UK, specializing in advising family enterprises and the Deloitte Global Leader Family Enterprise Consulting. An FFI Fellow, he is the recipient of the 2011 Richard Beckhard Practice Award and the 2002 International Award. Alexandra Sharpe, CFBA, leads the UK Family Enterprise Consulting. Those holding FFI certificates include Myria Antony, Walid S. Chiniara, Niall Glynn, Hugh Pickering, Shubhada Watson, and Joanne Whelan.



Read Niall Glynn's blog, "[Cousins and beyond: fostering unity as family and business grow.](#)"

Exaudi Family Business Consulting



Exaudi Family Business Consulting is a consulting firm dedicated to guiding and accompanying business families in the development and professionalization of their corporate and governance structures, the drafting of agreements regarding the management and transmission of shared patrimony, the planning of succession and leadership, and the preparation of members of the next generation to be responsible future owners. FFI members are Pablo Aure, CFBA; Vanessa Lean, CFBA, ACFWA; Lisa Morel, CFBA; and Guillermo Salazar, FFI Fellow, former board member, and recipient of the 2015 FFI International Award.



Guillermo is the chair of the 2019 FFI Miami conference program committee.

HEC Montréal



HEC Montréal is a French-language university offering management education and research. HEC's Deschênes Molson Lesage Family Business Centre informs, supports, coaches, and assists family businesses in the planning and transition process, as well as in the governance and development of the businesses themselves. HEC members are Luis Felipe Cisneros Martinez, FFI Fellow Danny Miller, and Isabelle Le Breton-Miller, co-recipients of the 2017 Barbara Hollander Award and the 2007 and 2009 Best Unpublished Research Paper Awards. Annie Veilleux is director of the Centre.



Read Isabelle's recent article in *FFI Practitioner*, "**For Love and Money: Married leaders of family firms.**"

Pitcairn

The logo for Pitcairn, featuring the word "PITCAIRN" in a blue, serif, all-caps font, underlined.

Pitcairn is one of the world's leading family offices. Founded in 1923, Pitcairn is dedicated to understanding families and consistently recognizes one overarching truth: No two families are the same. FFI members are Karen Carlson, Ronna Gyllenhaal, FFI Fellow and former board member, Dirk Junge, Andrew Pitcairn, and Leslie Voth. Pitcairn is the recipient of the 2009 FFI Interdisciplinary Award.

Download "[Longevity and Aging: A Discussion Guide for Families.](#)"



Leslie Voth is the president and CEO of Pitcairn.

Wells Fargo Private Bank



Wells Fargo Private Bank is a leading provider of wealth management services, meeting the needs of clients through multidisciplinary teams dedicated to understanding, analyzing, and evolving an integrated wealth plan that addresses both quantitative and qualitative issues. Advisers help the family engage in conversations surrounding shared values, the preparation of heirs, and family decision-making processes. FFI members are Katherine Dean; Suzanne Mansell; Natalie McVeigh, CFWA, ACFBA; and Gary Shunk, CFBA, CFWA.



Natalie McVeigh, who is a GEN faculty member and leader of the FFI Next Gen Virtual Study Group, is part of a panel on “Celebrating the Practitioner’s Spectrum” at the October **Global Conference** in London.

Read Natalie’s recent blog, “**What is Wealth?**”

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.

Q4 ENROLLMENT FOR THE GLOBAL
EDUCATION NETWORK (GEN) OPENS ON
OCTOBER 1.

Visit FFIgen.org to register for certificates in family business and family wealth
advising or contact [Gretchen Graham](#).

FFI Global Conference

Join the 2018 FFI Embankment Festival!

It's not too late to come to London for the annual global conference, October 24-26.

REGISTER

HOTEL RESERVATIONS