



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the FFI Organizational Members Part VII

DECEMBER 13, 2019



**T**oday we conclude this year's FFI Organizational Members Series. We are pleased to feature several distinguished organizations and educational institutions that are FFI organizational members.

## ATTORNEYS FOR FAMILY-HELD ENTERPRISES (AFHE)



The mission of **AFHE** 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.

More than 100 members of AFHE are FFI members. The current leaders of AFHE are Andrew N. Karlen (FFI Fellow, AFHE president); Michael Whitty (FFI Fellow, AFHE vice president); and David W. Burleigh (secretary). Andrew is a member of the FFI 2019-2020 Regional Planning Committee

The 2020 AFHE Annual Conference & Membership Meeting will be held from May 6-May 8, 2020 in Nashville, TN.

[LEARN MORE](#)



**Andrew N. Karlen**



**Michael Whitty**



**David W. Burleigh**

## CFAR



Originally a research center inside the Wharton School, **CFAR** is a private management consulting firm that has served family businesses nationwide from offices in Philadelphia and Boston for more than 30 years. CFAR helps family enterprise leaders address complex issues at the intersection of economics and relationships, including strategy, succession, governance, conflict resolution and leadership development.

FFI members include FFI Fellow and current FFI board chair Debbie Bing and FFI Fellow and recipient of the 2012 Richard Beckhard Practice Award Nancy Drozdow. Nancy is a founding member of the 2086 Society. Other members include Ashley Blanchard, Maria Cecilia Escallon, Nathan Hamilton, Katelyn Husereau, Mark Rembert, Christopher Robichaud, Todd Smith, and Caleb White.



**Debbie Bing**



**Nancy Drozdow**



**Mark Rembert**



**Caleb White**

Read Debbie Bing's letter, "From the board chair"

[READ LETTER](#)

Mark Rembert and Caleb White presented "Location, Location Location: What the changing geography of workers means for family business strategy."

[VIEW PRESENTATION](#)

## CRYSTAL, ALLIANT PRIVATE CLIENT



**Crystal, Alliant Private Client** is one of the world's leading strategic risk and insurance advisors. FFI members from Crystal, Alliant Private Client include FFI Fellow Linda Bourn, Jonathan H. Crystal, Paul Funk, Frank Harrington, and Tanis E. Perez. Linda is the co-chair of the 2020 FFI conference program committee.

Many thanks to Crystal, Alliant Private Client for sponsoring an annual Global Education Network (GEN) scholarship, awarded this year to Luciana Lucena de Lima.



Linda Bourn



Jonathan H.  
Crystal



Paul Funk



Frank Harrington



Tanis E. Perez



## DELOITTE PRIVATE FAMILY ENTERPRISE CONSULTING



**Deloitte.**

The **Deloitte Private 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 40 FFI members come from around the globe. Peter Pagonis is Deloitte Private Asia Pacific leader for family enterprise consulting. Michelle Osry is Family Enterprise Consulting practice leader, Deloitte Canada. Walid Chiniara is Deloitte Middle East leader for Family Enterprise Consulting. Richard Geldart is Family Office lead for Deloitte in North & South Europe.

Deloitte's GEN graduates in the last year are Michelle Hartman, Tadeusz Dulian, Christina Staples, Shu Yun Khoo, Thin Siew Chi and Phansak Sethsathira.



**Peter Pagonis**



**Michelle Osry**



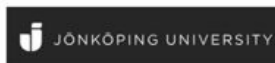
**Walid Chiniara**



**Richard Geldart**

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## JÖNKÖPING INTERNATIONAL BUSINESS SCHOOL



The center for Family Enterprise and Ownership (CeFEO) is located at **Jönköping International Business School**, Sweden. Its vision is to be an internationally leading knowledge and learning center through the creation, development, and dissemination of knowledge about family enterprise and ownership. FFI members include Massimo Bau, Kajsa Haag, FFI Fellow and 2012 International Award recipient Leif Melin, and Mattias Nordqvist.

Leif Melin and Mattias Nordqvist are co-author on the paper which was given Honorable Mention for FFI's Unpublished Research Paper Award, "Tonic or Toxin? Investigating the Adoption of "Professional" Practices in Family Firms."



**Massimo Bau**



**Leif Melin**



**Mattias Nordqvist**

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## LANSBERG, GERSICK & ASSOCIATES, LLC

LANSBERG·GERSICK

**Lansberg, Gersick & Associates** is a consulting and research firm that advises family enterprises on succession, continuity, leadership development, governance and philanthropy. FFI members include FFI Fellows Neus Feliu Costa, Michele Desjardins, Katherine Grady, Kelin Gersick, Ivan Lansberg, Maria Dolores Moreno, and Wendy F. Ulaszek. Other members include Don Carlson, Gustavo Carvajal, Devin DeCiantis, Nicolas Hollanders de Ouderaen, Maria Fernanda Jaramillo, Francisco Valera.

Ivan and Kelin have been co-editors of *FBR* and LGA sponsors the *FBR* Best Article Award. Neus is a member of the GEN 504 faculty.

Many thanks to Lansberg, Gersick & Associates for sponsoring the FBR Best Article award, presented by Kelin Gersick (right) and accepted by Frank Barbera, co-author, along with Isabell Stamm and Rocki-Lee DeWitt.



**Neus Feliu Costa**



**Kelin Gersick**



**Ivan Lansberg**

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## PITCAIRN

The logo for Pitcairn, featuring the word "PITCAIRN" in a blue, serif font with a thin blue underline.

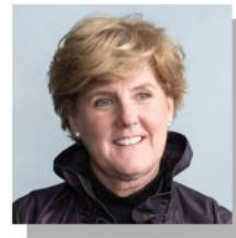
**Pitcairn** is a leading multi-family office, dedicated to helping families sustain and grow their substantial, often complex financial assets and support their unique heritage across multiple generations. Pitcairn works with multi-generational families and single-family offices filling a single need or providing comprehensive solutions. FFI members include Karen Carlson, FFI Fellows Dirk Jungé and Ronna Gyllenhaal, Amy Hart Clyne (member of the 2020 Conference Program committee), Andrew Pitcairn, and Leslie Voth.



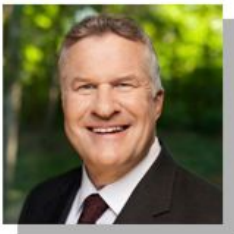
**Karen Carlson**



**Ronna Gyllenhaal**



**Amy Hart Clyne**



**Dirk Jungé**



**Andrew Pitcairn**



**Leslie Voth**

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## REGENERATION



**REGENERATION** has focused on supporting family businesses for more than 20 years, helping clients increase business and wealth while strengthening their families. FFI members include FFI Fellow Elle Hansen, FFI Fellow and 2009 recipient of the Richard Beckhard Practice Award James O. Hutcheson, Amy Campbell, and Mary Ann Zimmerman.





Elle Hansen



James O. Hutcheson



Mary Ann Zimmerman

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## THE FAMILY BUSINESS CONSULTING GROUP



**The Family Business Consulting Group** 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. With over 2,500 client families in 70 countries, FBCG consultants have successfully led businesses across industries, family structures, and cultures through the issues, both common and uncommon, faced by families in business together.

FFI members include FFI Fellow, past FFI president, and 1997 recipient of the Richard Beckhard Practice Award Craig E. Aronoff; Otis Baskin, Kristi Daeda, FFI Fellow Barbara Dartt, Christopher Eckrich, Tom Emigh, FFI Fellow Michael Fassler, Gregory Greenleaf, FFI Fellow David M. Karofsky; David Lansky, Victor Martin, Stephen McClure, FFI Fellow Jean Meeks-Koch, FFI Fellow and 2017 recipient of the Richard Beckhard Practice Award Drew Mendoza, Aileen Miziolek, Kent Rhodes, FFI Fellow Wendy Sage-Hayward, Joe Schmieder, Amy Schuman, Rob Sligh, FFI Fellow John Ward, and Amy Wirtz.

David Karofsky will be co-leading a GEN alumni webinar on January 21, and Jean Meeks-Koch has joined the GEN faculty.



David M. Karofsky



Jean Meeks-Koch

## FFI ORGANIZATIONAL MEMBERS

[VIEW COMPLETE LISTING](#)

[VIEW MEMBERSHIP DETAILS](#)

FFI is the leading association worldwide and the organization of choice for advisors, consultants, educators, researchers, and family enterprise members who help perpetuate trans-generational family business wealth.

### Get Listed in the Consultants & Speakers Directory

As a member of FFI, you have the unique opportunity to be listed in the FFI Consultants & Speakers Directory. This Directory is a global resource for connecting professional organizations, advisors and consultants with the media, family offices and family enterprises. Take advantage of the opportunity to be found quickly and easily with a profile in the FFI Consultants & Speakers Directory. For more information and to discuss your listing, email [ffi@ffi.org](mailto:ffi@ffi.org).

[LEARN MORE & SIGN UP](#)

## PREVIOUS EDITION



The 2020 FFI conference in New York City is the place to share your vision for the future and your thoughts on what might have been “rose-colored” glasses interpretations of the past. Either way, Bright Spots or Blind Spots, please submit your proposals by January 13 for consideration by this year’s conference program committee. A new decade is right around the corner, and we all need your best thinking to continue the stimulating FFI conferences.

[READ MORE](#)



## DATES TO REMEMBER

DEC  
31

### 2020 Annual Global Conference

Last day to register for annual global conference at Year-end rate

[VIEW DETAILS](#)

JAN  
13

### 2020 Annual Global Conference

Last day to submit proposals for the 2020 conference

[VIEW DETAILS](#)

JAN  
21

### GEN Alumni webinar (by invitation only)

THE ROLE OF GOVERNANCE: Case Studies and the Multi-Roles Model©

FFI Fellows David Karofsky and Paul Karofsky

FEB  
06

### 2020 Regional Reception

2020 Regional Reception in NYC with FFI board, the program committee, and the 2020 Regional Advisory Committee