



PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the Chair

FEBRUARY 22, 2019

INTRODUCTION



Dear Colleagues,
I am pleased to report that the FFI board of directors and the 2019 Global Conference planning committee held a series of meetings earlier this month to further the strategic goals of the organization and to put in place the final plans for the October 23-25 conference in Miami.

Here are some highlights.

EDUCATION

GEN

We received a variety of reports on our Global Education Network (GEN) program, now in its sixth year.

Last year more than 150 students were active in the program and, since its inception, GEN has award more than 700 certificates. Congratulations to all the students, faculty, mentors and staff who make this program a success. Special thanks to Carlo Salvato, GEN faculty chair, who is finishing revisions to the Advanced Certificate in Family Wealth Advising this year. Look for revisions to GEN 504 *Meaning and Purpose: Philanthropy and the Family Enterprise* with faculty members James Coutre and Maya Prabhu.



Carlo Salvato
Bocconi University

James Coutre
Fidelity Family Office Services

Maya Prabhu
J.P. Morgan Private Bank

2019 Conference

Thanks to the conference committee which reviewed many excellent proposals and has developed a fantastic program for you.

Stand by for the complete results – all of which are based on the theme of “The New Frontier: Disruption and co-creation in the field of family enterprise.” If you haven’t already registered, please do so before the **Winter Special** expires.



Guillermo Salazar, chair
Exaudi Family
Business
Consulting



Patricia Arrázola
Arrazola &
Associates



Maria Jose Parada Balderrama
ESADE
Business
School



Isabel Botero
Stetson
University



Salvador Ceron
STF Consulting
Group



Jennifer East
ONIDA Family
Advisors Inc.



Frank Harrington
Crystal & Co.



Alexander Hayward
Ernst & Young
LLP



Tanis E. Perez
Crystal & Co.



James Weiner
Inheriting
Wisdom

RESEARCH

FBR

We received a report from *FBR* editor, Tyge Payne, underlying the incredible impact of the journal and plans for 2019.

Read the “**Early Release**” of the **March issue of FBR** in *FFI* on Friday.

2086 Society

We enthusiastically received a report from the 2086 Society, detailing its

plans to focus on applied research and the seven topics it has identified.

Thanks to all who completed the survey and stand by for the call for papers which will follow on the topic or topics identified.

PUBLIC AWARENESS

New Initiative

A new initiative on Impact Investing was approved under the leadership of board members Fabian Bernhard, Peter Englisch, Dan Frosh, Greg Khost, and Carlo Salvato (pictured above).

Details are being finalized and there will be a preliminary report at the October conference.



Fabian Bernhard
EDHEC Business
School



Peter Englisch
Pricewaterhouse
Coopers GmbH



Dan Frosh
Cambridge Advisors
to Family Enterprise



Gregory Khost
Bank Wealth
Management-
Americas

Two new regional committees are being put in place. One in New York City and a second in the UK/Europe. Watch for more details and email [Judy Green](#) if you are interested in participating. We are looking for two- to three -year commitments for these committees.

Of course, we also received other reports, reviewed financials, and engaged in creative dialogue on a variety of topics. Currently we have nearly 1900 members in more than 80 countries! We spent some time reviewing the organizational members of FFI – 66 in total, representing nearly half of the individual memberships. View the [complete list](#).

Another highlight of the retreat was a **regional reception** at the conference hotel, Marriott Key Biscayne, where members and friends met for conversation and networking.

The board will meet between now and October via Zoom and in person again in Miami in the fall – where we hope to see many of you at the conference.

It's a pleasure to serve as chair of the board, and I thank the outstanding [board members](#) who join me in looking after this vibrant organization.



DJAH Partners

Sincerely,

David Harvey
Chair

PREVIOUS EDITION



We are pleased to provide you with an advance look at the March 2019 issue of *Family Business Review (FBR)*.

[READ MORE](#)

DATES TO REMEMBER

MARCH

03.01

Last day to submit for the Best Doctoral Dissertation Award

[SUBMIT](#)

03.08

Last day to begin FFI GEN online coursework for Q1 Capstone webinars

[DETAILS](#)

03.18

2019-2021 UK/Europe Regional Planning Committee

[EMAIL FOR DETAILS](#)

03.21

Last day to register for the 2019 Miami conference at the Winter Special rate

[REGISTER](#)

A P R I L

04.15

Last day to submit a paper
for the Best Unpublished
Research Paper Award

SUBMIT

Last day to submit a
nomination for an
Achievement Award

SUBMIT

Last day to apply for a GEN
scholarship

APPLY