



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Meet the 2019 Nominees for the FFI Board of Directors

JUNE 21, 2019

INTRODUCTION



The FFI Board of Directors provides strategic vision and oversight for the development of the organization. Over the past few months, the 2019 Nominating Committee has solicited suggestions for nominees, and interviews with potential candidates have been held. The Committee is pleased to announce the following nominees for four-year terms on the FFI Board of Directors. Voting will be conducted by electronic ballot, which will be sent to FFI members in mid-August. New board members will take office following the annual meeting held on October 25, 2019, at the [annual global conference in Miami](#).



Mary Duke

Mary Duke, JD, TEP, CMA, is an internationally recognized, independent advisor to families navigating the complexities of substantial wealth. She is known for her deep understanding of the impact of trusts on families and for her work in generational dynamics in family enterprises. Her work is anchored in the facilitation of family meetings, leadership development in rising generations, and strategic planning for family enterprises. She has an excellent track record for helping family members collaborate more effectively, manage their naturally occurring conflict, and leverage governance for effective decision-making. Previously, Mary headed two private family offices and founded a leading bank's global family wealth program, while heading a private bank with seven international trust companies. She has also served tours of duty in private client law and business consulting. She has been recognized with STEP's Private Client Award for family business advisor and the Family Wealth Report's award for specialist advisor.

Statement of Purpose

I am excited about the role FFI will play in our rapidly changing world and hope to leverage my passion for learning and collaboration along with my global network to expand our footprint with new memberships and to further deepen our connection with current members. I am keen to showcase FFI's exceptional research and find new ways to extend our reach in support of families with owned enterprises. I have a deep appreciation for the importance of an impactful board and hope to add my energy and experience to the team leading FFI so it can continue to evolve in its role as the preeminent source of learning for us all.



Cynthia Lee

Cynthia Lee is Head of Private Wealth Solutions for North Asia at HSBC Private Banking and is responsible for supporting HSBC's clients in their trust and estate planning, family governance, philanthropy, and succession needs. She has more than 20 years of experience in wealth advisory and trust planning, with a focus on private clients and families. Prior to joining HSBC, Cynthia was Managing Director and Head of Wealth Advisory Group at J.P. Morgan's Private Bank in Asia. Based in Hong Kong, she was responsible for the firm's Wealth Advisory practice in Asia and advancing the firm's efforts to develop customized and leading-edge wealth planning products and solutions for clients, especially in the areas of offshore trust structuring, multi-jurisdictional tax planning, as well as estate and family office planning. She holds a Bachelor of Laws degree from King's College London of the University of London and a Postgraduate Diploma in Laws from the University of Hong Kong.

Statement of Purpose

I aim to bring about my energy and passion to deliver and further the cause, brand, and outreach of FFI. If elected, I will strive to make FFI the global and most relevant network of family business practitioners and thought leaders especially in Asia. Through events, conferences, and training courses, working with Asia-based organizations and financial institutions, I hope to raise the profile of FFI in the region and for it to be known as the thought leadership institute to families, academia, and the industry.



Lisa Morel

Lisa Morel, Esq., MBA, CFBA, is partner and director for Exaudi Family Business Consulting in the Dominican Republic. Lisa has years of experience advising family business groups regarding governance and legal structures in the context of generational transitions. Driven by being a family business member herself, she pursued a CFBA at FFI and established the first family business advising firm in her country. She is a graduate of Columbia Law School, a member of the New York Bar, and a member of the Entrepreneurship Commission of the National Association of Young Business Leaders (ANJE), where she chairs its annual Families in Business Conference. Lisa has been a guest lecturer at international conferences throughout Latin America.

Statement of Purpose

Family enterprises are at the core of our economies and impact the life of so many people. I am convinced their growth and sustainability will require individuals from many different disciplines collaborating on complex issues with the correct set of tools. FFI has led and championed this multidisciplinary approach and drives it forward. My goal is to help expand this great institution's reach in Latin America and to actively contribute to FFI's mission of shaping a new generation of practitioners innovating in the family enterprise education field.



Maya Prabhu

Maya Prabhu, CFBA, ACFWA, leads J.P. Morgan Private Bank's Wealth Advisory practice across the EMEA region. As a practitioner, her areas of focus include developing family governance and communication strategies, next generation engagement and development, establishing family offices, and crafting impactful and rewarding philanthropy strategies. Maya has worked with families around the world, especially in the UK, Continental Europe, Middle East, and Asia. Prior to joining J.P. Morgan in 2018, Maya worked at Coutts & Co., London for more than 10 years. She has trained as an executive coach and mediator. Maya teaches GEN 504 and contributes to *FFI Practitioner*. She is a faculty member for STEP and has also guest lectured for the Wealth Management Institute, Singapore. Maya volunteers as a community mediator.

Statement of Purpose

I am passionate about the mission and work of FFI and am grateful for how it has shaped my own practice, learning, and development. I am honoured to be nominated to serve on the Board. If elected, I will bring my global networks and communication skills to bear as an ambassador and advocate for FFI and its GEN programmes. I will also bring my career experience of being an 'intra-preneur' and team leader, to contribute to FFI's continued growth and strategic development as a leader in education, thought leadership, and networks in the field of family enterprise.



Jonathan Ramos

Jonathan Ramos, RFC, ACFWA, is the Founder and CEO of Premier Family Business Consulting in Cebu City, Philippines, and currently serves families in business as Senior Partner Consultant. He is a pioneer graduate of the Advanced Management of Southeast Asian Business Studies at the University of Asia and the Pacific and IESE Business School. Jonathan leads a pool of values-driven professionals in uniting families in business for generational wealth, where he has strongly advocated for the professionalization of family businesses. He has organized the Family Enterprise Excellence Conference for ten years, a one-of-a-kind national conference to bring together from all over the world the best minds in family business consulting and the experiences of families in business. He has been serving more than 68 families in business with his multidisciplinary team of experts and is actively holding key roles in his current board position to influence multiple industries, including hospital, retail, manufacturing, trading, real estate, and many others, for good governance and to change management practices. His mission is to inspire and influence family unity for generational wealth.

Statement of Purpose

FFI represents the best minds in the world and a body of knowledge culled from a century of experience and expertise. Being a member is truly a privilege. If bestowed the honor to serve in the board, I would like to play a vital role in expanding the reach of FFI to Asian families of wealth and in business, to collaborate, connect, and make them become engaged members of FFI, adding experiential flavor (family-based) to professionals in FFI in real time and direct engagement, and to give them the avenue to pursue lifelong learning in holistic and multidisciplinary ways, with practitioners and researchers that could hopefully fast track the change process that they are undergoing, whether consciously or unconsciously, to be able to achieve quick wins for a greater success and generational wealth. Furthermore, it's my desire to grow the family business consulting practice and industry in the Asian region, by inspiring and influencing more professionals to be of better service to family-owned businesses by evolving to be holistic family business consultants enrolled in FFI's Global Education Network.

THANK YOU

Thank you to the FFI members who participated in this process and especially to the 2019 Nominating Committee for its selection of these candidates. Nominating committee members are [Catherine Rossbach](#), chair; [Fabian Bernhard](#), [Jeremy Cheng](#), [Luis Medina](#), [Wendy Sage-Hayward](#), and [David Harvey](#), ex-officio.

DATES TO REMEMBER

JULY
1

Last day to submit a case for the Family Enterprise Case Competition

[VIEW DETAILS](#)

SEP
15

Last day to submit proposals for the 4th Review Issue of *Family Business Review (FBR)*

[VIEW DETAILS](#)

SEP
24

London Regional event | 4:30PM to 7:30PM

Host: KPMG LLP, 15 Canada Square, London, England

Program: Master Class with Dr. Kris Verburgh, author of *The Longevity Code* and keynote speaker at the FFI Global Conference

OCT
23-25

Annual Global Conference in Miami

[VIEW COMPLETE PROGRAM AND REGISTER](#)

[VIEW HOTEL RESERVATIONS](#)

PREVIOUS EDITION



The FFI Board of Directors and the members of the 2086 Society have announced that the first grant in the applied research initiative has been awarded.

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