



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Introducing the 2019-2020 NYC Regional Planning Committee

MARCH 08, 2019

## INTRODUCTION



In this issue of *FFI on Friday* we are pleased to introduce the **2019-2020 NYC Regional Planning Committee**. This is a new FFI committee that held its first meeting on February 1, 2019 at Deutsche Bank Wealth Management. It was hosted by FFI board member Greg Khost.



**Greg Khost**

Deutsche Bank Wealth Management-Americas

### The purpose of this committee is to:

*Expand the presence of FFI as an organization and presence of FFI members in the NYC area in the next two years, build enthusiasm for the 2020 October conference, and promote the multidisciplinary, global approach that is at the core of FFI's mission "to be the most influential global network of thought leaders in the family enterprise field."*

### To implement the goals of the committee, it has agreed to:

- Devise a series of events in 2019 and 2020 that follow the FFI vision of

**educating, connecting, and inspiring professionals and academics in the field to better serve their client base and develop new modes of research and conceptual models. Currently planned are:**

- A June 18 event hosted by TrustedFamily. Elvira Orza is the committee member organizing the program.
- A 2019 Fall event in conjunction with one or more of FFI's **organizational members**. Committee members Roger Healy, Andrew Karlen, and Andrea Santos are planning this event.



**Elvira Orza**  
TrustedFamily



**Roger Healy**  
Global Family  
Advisors LLC



**Andrew Karlen**  
Attorneys for Family  
Held Enterprise



**Andrea Santos**  
UBS Financial  
Services, Inc.

- **Research other NYC-based organizations, outside of FFI membership, that would further the mutual goals of FFI and the collaborating organizations. Committee members Patricia Angus, Warner Babcock, Linda Bourn, Adib Rashid, Mark Rubin, and Babetta von Albertini are working on this initiative.**



**Patrica Angus**  
Angus Advisory Group and  
Columbia University



**Warner Babcock**  
NYC Family Enterprise Center



**Linda Bourn**  
Crystal, the Private Client  
Group of Alliant



**Adib Rashid**  
Nexel Partners



**Mark Rubin**  
FTI Consulting



**Babetta von Albertini**  
Lansberg, Gersick &  
Associates, LLC

- **Raise the profile of the committee by writing a series of *FFI Practitioner* articles in the coming two years that focus on NYC as a model for multi-generational global enterprise activity, research, and professional expertise. Committee**

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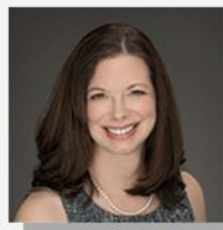


**Babetta von Albertini**  
Lansberg, Gersick &  
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- **Raise the profile of the committee by writing a series of *FFI Practitioner* articles in the coming two years that focus on NYC as a model for multi-generational global enterprise activity, research, and professional expertise. Committee members Linda Bourn (pictured above), Rebecca Meyer, and Mindy Rosenthal agreed to write for *FFI Practitioner* in 2019. Watch for these articles beginning in April.**



**Rebecca Meyer**  
Relative Solutions



**Mindy Rosenthal**

- **Work with the 2019 Miami program committee to identify possible NYC-based presenters and develop plans for the Kickoff to NYC in October.**

*Other strategies will be developed in the next 18 months.*

The committee members to date, in addition to those named above, are:

**David Braham**

Campden Wealth

**Gary Brooks**

BMD Advisors

**Lance Bylow**

Citi Private Bank

**Lindsay Martin**

J.P. Morgan Private Bank

**Henry Snyder**

J.P. Morgan Private Bank

**Leah Zveglich**

The Aster Club

*Interested in participating in this initiative? Email [Judy Green](#).*

## PREVIOUS EDITION



The 2019 Nominating Committee welcomes suggestions from the FFI membership for possible nominees for consideration for Board of Director positions for four-year terms that begin following the Annual Meeting in Miami in October 2019.

[READ MORE](#)



## DATES TO REMEMBER

MAR  
08

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

[DETAILS](#)

MAR  
18

2019-2021 UK/Europe Regional Planning Committee

[EMAIL FOR DETAILS](#)

Last day to suggest candidates for 2019 Board of Directors

[ONLINE FORM](#)

MAR  
21

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

[REGISTER](#)

APR  
1

Last day to submit proposals for 2086 Applied Research Project  
Bowen Theory and Beyond

[READ DESCRIPTION AND SUBMIT ONLINE](#)

Family New/Renewed Attention to Issues of Their Collective Ownership

[READ DESCRIPTION AND SUBMIT ONLINE](#)

APR  
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](#)