



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the FFI Organizational Members

MARCH 15, 2019

## INTRODUCTION



**W**elcome to the first in our 2019 series of issues featuring the distinguished organizations and educational institutions that are FFI organizational members.

## ANZ PRIVATE BANK



**ANZ Private Bank** helps successful individuals and families grow, protect and enjoy their wealth. It offers solutions tailored to meet investment needs aligned to the client's objectives and family charter, as well as advice on intergenerational wealth transfer, philanthropic pursuits, and the education of future generations. FFI members are Sandy Basten, James Dunlop, Susan Hawkins, and Shaun McKeon, all of whom hold GEN Certificates in Family Business Advising and Family Wealth Advising.



Listen to and download "**ANZ Global Mark Outlook 2019: A challenging year.**"



## EDHEC BUSINESS SCHOOL



**EDHEC Business School** was created in 1906 by and for entrepreneurs and has embodied the fundamental values of business for over a century. The Family Business Center offers a holistic approach to the family business, focusing on business and socio-emotional dimensions at each level of its research, educational programmes, and dissemination activities. FFI members are Fabian Bernhard, ACFBA and FFI board member; Ludovic Cailluet; and Rania Labaki, FFI Fellow and recipient of the 2015 *FBR* Best Article Award and the 2012 Best Dissertation Award.



**Fabian Bernhard**

Fabian is co-presenting "Emotional Disruption and Collaborative Co-creation: On the dynamics of the sale of Spain's oldest family business" at the FFI Global Conference in Miami.



**Rania Labaki**

Rania contributed a chapter ("**Family Business Research: An epic of dangerous liaisons**") in the recently published book *Variations around SMEs and mid-size companies*. She is co-presenting "Creative Disruption: What does it take to create a collaborative space within business families" at the FFI Global Conference in Miami.

## FAMILY BUSINESS AUSTRALIA



**Family Business Australia** (FBA) is the peak body for family business in Australia, a sector which accounts for almost half a million businesses and fifty percent of the Australian workforce. FBA provides access to education and training for family specific and general business development and generates opportunities for families in business to learn and grow by networking and sharing with their peers. FBA members in FFI come from all six Australian states.



Read the recent FBA blog "[Why Family Businesses Need Cyber Insurance.](#)"

## FTI CONSULTING, INC.



**FTI Consulting, Inc.** is an independent global business advisory firm dedicated to helping organizations manage change, mitigate risk, and resolve disputes: financial, legal, operational, political and regulatory, reputational and transactional. The firm offers a comprehensive suite of services designed to assist clients across the business cycle – from proactive risk management to the ability to respond rapidly to unexpected events and dynamic environments. FTI members are Nancy Coelho, Mark Halpern, and Mark Rubin who is an FFI Fellow, former FFI board member and serves on the FFI **2019-2020 NYC Regional Planning Committee.**

## HEMENWAY & BARNES LLP



**Hemenway & Barnes LLP** was founded in 1863 to serve New England's thriving business community and its wealthy families and their institutions. The firm's multidisciplinary approach promotes planning that enhances the success of the enterprise and, more importantly, the unity and strength of the family. In addition, Hemenway & Barnes professionals work with families to assess the many factors involved in making the very personal decision to establish a family office, including size of the asset base and family dynamics. FFI members are Mark Elefante, Marianne Herlihy, Arthur Page, and John Siciliano.



John Siciliano and his colleague Nathan McConarty recently presented "[Consider Your Family Legacy When Selling Your Business](#)" at a New England Chapter March breakfast.

## IMD GLOBAL FAMILY BUSINESS CENTER



**IMD Global Family Business Center** was established in 1988. Today, the Center of Excellence operates from the campus in Lausanne and a campus in Singapore, delivering open and custom programs worldwide. Dedicated to the real issues facing family businesses, family offices, and family foundations, IMD helps ensure the sustainable success of the business and family, whether large or small. FFI members are Matthew Crudginton, FFI Fellow Denise Kenyon-Rouvinez, Jung Park, Peter Vogel, and Marta Widz. The **IMD Global Family Business Award** is accepting nominations through March 31.



**Peter Vogel**

Read Peter Vogel's article "**The Digital Tsunami: How it impacts your business.**"



**Marta Widz**

Marta Widz is presenting "Reimagining Extremes in the Continuum of Governance Models: Two case studies" at the FFI Global Conference in Miami.

## J.P. MORGAN PRIVATE BANK



**J.P. Morgan Private Bank** brings intelligence and personalized insights to individuals and families across the globe. The professional team guides clients on the complexities that accompany successful family enterprises, drawing on insights from across the firm. The 42 FFI members come from France, Germany, Hong Kong, Italy, Singapore, Spain, Switzerland, UK, and US.





Read an [article and interview](#) with Miami art patron Jorge Perez. The PAMM (as it is called) is a short distance from the 2019 FFI conference hotel on Biscayne Bay.



Read an [article and white paper](#) on philanthropy, climate change, and conservation.

## STEP



**STEP** is a professional, international, and outward facing organization, whose primary purpose is to improve public understanding of the issues families face in relation to inheritance and succession planning and promote education and high professional standards among its members. STEP members in FFI hail from countries around the globe, including Cyprus, the Cayman Islands, Seychelles, United Arab Emirates, United Kingdom, Uruguay, and the US. Mark Walley was recently appointed the new STEP chief executive.



View details on the [STEP Private Client Award 2019/2020](#).

## U.S. TRUST FAMILY OFFICE



**U.S. Trust Family Office** has spent decades helping families manage not just life's challenges, but also its opportunities. The family office practice is dedicated to extending the reach and legacy of some of the nation's wealthiest families by listening intently, advising intelligently, and executing skillfully. The practice is solely focused on planning, administering, reporting, and consulting on the diverse aspects of family wealth. FFI

members are Carrie R. Seligman, FFI Fellow and chair of the FFI New England Chapter; Holly Harben Swan; and Howard M. Weiss.



Read Howard Weiss's blog "[Building A Family Legacy – 50 Questions To Answer.](#)"

## VON SEELSTRANG & PARTNER



**von Seelstrang & Partner** offers clients a wide range of legal and tax expertise. The team includes specialist lawyers for inheritance law, commercial and corporate law, tax law, and employment law. Together with tax consultants and auditors, the firm works out tailor-made and holistic client solutions. The firm handles national and international inheritance cases with references to Australia, New Zealand, the US, and European Union states. FFI members are Stephan Ebner, Christoph Hoheneegg, Stefan Raster, and Mario von Seelstrang.

*Please welcome FFI's newest organizational members:*



Stephan M. Ebner



Christoph Hoheneegg



Stefan Raster



Mario von Seelstrang

## FFI ORGANIZATIONAL MEMBERS

[VIEW COMPLETE LISTING](#)

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 [membership@ffi.org](mailto:membership@ffi.org).

## DATES TO REMEMBER

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](#)

## PREVIOUS EDITION



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.