



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the FFI Organizational Members Part VI

NOVEMBER 15, 2019



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

## BANYANGLOBAL FAMILY BUSINESS ADVISORS



**BanyanGlobal** advises the owners of the world's leading family enterprises as they make difficult decisions during transitions. When set up thoughtfully, a family's involvement with these enterprises is often the key to their longevity. FFI members are Vlad Barbieri; Josh Baron; Nick Di Loreto; Aline Porto; and Marion McCollom Hampton, FFI Fellow and former FFI board member.

READ AN ARTICLE CO-WRITTEN BY NICK DI LORETO, "5 SIGNS YOUR FAMILY BUSINESS MIGHT HAVE AN ETHICS PROBLEM"

READ "EMPTY STRUCTURES SYNDROME: LOSING THE ENERGY THAT DRIVES GOVERNANCE," WRITTEN BY NICK DI LORETO AND MARION MCCOLLOM HAMPTON



Vlad Barbieri



Josh Baron



Nick Di Loreto



Marion  
McCollom  
Hampton



Aline Porto

## CLAIRMONT TRUST COMPANY



**Clairmont Trust Company**, based in the Bahamas, is committed to providing comprehensive wealth structuring services and investment advice for each client. It offers wealth structuring and family advisory services, corporate and family governance, expert fiduciary services, and family office services. Clairmont's FFI members are FFI Fellow Miles Evans and FFI Fellow and former board member James Stewart.

Clairmont sponsored the keynote presentation of Dr. Kris Verburgh at the FFI Global Conference.

[READ AN INTERVIEW WITH DR. VERBURGH, "LONGEVITY, HEALTH, AND FAMILY ENTERPRISE: AN INTERVIEW WITH KRIS VERBURGH, MD"](#)



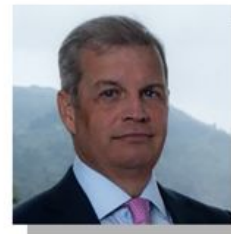
Miles Evans



James Hoar



John Jephson



James Stewart



## EISNERAMPER



EISNERAMPER

The **EisnerAmper Center for Family Business Excellence** is dedicated to helping guide and support clients through the full range of challenges and transitions that a family business will face over the course of its lifetime. Members are Matthew Kerzner, Natalie McVeigh, Lisé Stewart, and Kristen Ward.

Natalie McVeigh is on the FFI board of directors and a member of the GEN faculty. She was a presenter at the FFI Global Conference this October.



Matthew Kerzner



Natalie McVeigh



Lisé Stewart



Kristen Ward

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## EXAUDI FAMILY BUSINESS CONSULTING



EXAUDI®  
FAMILY BUSINESS CONSULTING

Since 2010, **Exaudi Family Business Consulting** has been accompanying and orienting business families through several consulting processes, strengthening the governance structures required to ensure continuity of family business. The Exaudi team of advisers is based in several countries, to give direct support to enterprising families during their consulting processes. Exaudi's FFI members are FFI Fellow Pablo Aure Fariñez, Paula Rincón, Lisa Morel, and FFI Fellow Guillermo Salazar.

Lisa Morel was elected to the FFI board of directors at the Global Conference in October.

Paula Rincón is chair of the Iberoamérica Study Group.

Guillermo Salazar was chair of the 2019 Conference Program Committee. Read his recent *FFI Practitioner* article, "**Working with Family Diagrams in Family Business: Reflections from 20 years of practice.**"



Pablo Aure Fariñez



Lisa Morel



Paula Rincón



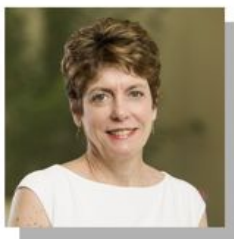
Guillermo Salazar

## GENSPRING/SUN TRUST



GenSpring exclusively serves clients of **SunTrust Private Wealth Management**. For more than 30 years, their work has set the standard for helping families effectively manage their wealth while creating a positive impact on those who benefit from it. SunTrust Private Wealth clients with \$25MM+ in managed investments have access to the GenSpring client experience. In order to provide the sophisticated expertise needed to proactively advise relationship of this complexity, GenSpring professionals have the SunTrust's lowest client-to-advisor ratio. FFI members are Carolann Grieve, David Herritt, and Daisy Medici.

Daisy Medici is on the FFI New England Chapter Steering Committee.



Carolann Grieve



David Herritt



Daisy Medici

## INSTITUUT VOOR HET FAMILIEBEDRIJF



The **Institute for Family Business** is the knowledge center for family businesses in Flanders. The IFB informs, advises and guides family businesses on all aspects that characterize family business. In this way, the institute wants to contribute to the professionalization, continuity and further development of family businesses in Flanders. Based on its ambition to be a thought leader for family business leaders, the Institute for Family Business takes initiatives regarding education, networking, research, advocacy and international contacts. FFI members are FFI Fellow Sofie Lerut, FFI Fellow Józef Lievens, and Patrick De Schutter.

[READ THE IFB BLOG ON GOVERNANCE](#)



Sofie Lerut



Józef Lievens



Patrick De Schutter

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## WEALTH MANAGEMENT INSTITUTE



The **Wealth Management Institute** is an autonomous institute at the Nanyang Technological University Singapore. WMI is a practice-based education and research institute with programs deeply integrated with and aligned to serve the needs of the asset and wealth management industry. Appointed as the Lead Training Provider for Private Banking by the Institute of Banking and Finance Singapore, it focuses on the continuing education of professionals through its Master of Science in Asset & Wealth Management degree program and professional certification programs. WMI's FFI members include its Chief Executive Officer Ms. Foo Mee Har and Director, Programme and Curriculum Development, Ms. Janice Poon.

Read Foo Mee Har's comments on a multi-disciplinary research partnership among WMI, the Monetary Authority of Singapore, and other departments at NTU, to develop new methods for the wealth management industry to better combat money laundering practices through the use of artificial intelligence (AI) and machine learning.





Foo Mee Har



Janice Poon

## 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.

In case you missed the previous editions featuring our organizational members, here they are:



[READ EDITION](#)



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## PREVIOUS EDITION



We are pleased to introduce the following FFI members who were granted Fellow status at the October global conference in Miami.

[READ MORE](#)

## DATES TO REMEMBER

NOV  
19

### GEN Alumni Webinar Series

What's in a Name: Mediation, Facilitation, or Consultation? (By invitation only)

Presenter: John Wofford, Esq.

NOV  
22

### Building Family Business Boards for the Long Term

STEP Business Families Special Interest Group in London

[VIEW DETAILS](#)