



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# It's Friday in Miami

OCTOBER 25, 2019



**G**reetings from Miami, where we are in the last day of the 2019 FFI Global Conference. Of course, we wish all the membership could be here, but if you're not (and even if you are), here are some highlights from the event and related articles that have appeared either in *FFI Practitioner* or *FFI on Friday*.

And please mark your calendars for October 28-30, 2020 for the next FFI Global Conference at the Marriott Marquis in New York City.



## PRESENTATIONS

The annual conference features more than 30 presentations over three days.



Read an interview with Kris Verburgh, whose opening keynote is entitled "The Future of Biotechnology and Longevity: Opportunities and perils."

[READ MORE](#)

This presentation was sponsored by Clairmont Trust and introduced by Clairmont partner, James Stewart.



**Kris Verburgh, MD**



**James Stewart**

Claudia Binz Astrachan and Fabian Bernhard presented a preliminary report on the first 2086 Society Applied Research award. The research is entitled “Professionalizing the Business Family: Essential business, family and self-competencies for responsible owners.” This presentation focused on two key aspects of the research: what is meant by “the professionalization of ownership” and important findings on the utilization of process. A final report and a series of shorter papers and publications will follow in early 2020.

LEARN MORE ABOUT THE RECIPIENTS OF THE FIRST APPLIED RESEARCH AWARD FROM THE 2086 SOCIETY



**Claudia Binz Astrachan**



**Fabian Bernhard**

Read an *FFI Practitioner* interview with Ross Ellenhorn on the topic addressed during his session at the conference: “The Paradigm Shift in Addiction Treatment: Implications for families and their advisers.”

READ MORE



**Ross Ellenhorn**



## AWARDS AND CEREMONIES

On Thursday, FFI recognized the GEN Certificate graduates and the 2019 FFI Awards recipients. Follow the links below to learn more about the recipients and their achievements.



[FFI GLOBAL EDUCATION NETWORK \(GEN\) CERTIFICATE BREAKFAST](#)

[STARRY NIGHT GALA AWARDS](#)



## WELCOME NEW BOARD MEMBERS



At noon on Friday the following new board members take office!



**Mary Duke**  
High Road  
Advisors, LLC



**Cynthia Lee**  
HSBC Private  
Banking



**Lisa Morel**  
Exaudi Family  
Business  
Consulting



**Maya Prabhu**  
J.P. Morgan  
Private Bank



**Jonathan Ramos**  
Premier Family  
Business  
Consulting

## THANKS TO THOSE WHOSE TERMS HAVE ENDED

The following were thanked for their service to FFI as board members over the last several years.



**Dan Bayston**  
Cognient Group,  
LLC



**David Harvey**  
DJAH Partners



**David King**  
Triple Crown  
Sports



**Annie Koh**  
Singapore  
Management  
University



**Catherine  
Rossbach**  
Bertoli Mitchell

## PREVIOUS EDITION



In this issue, we highlight the Q3 GEN graduates who are receiving the Dual Certificate in Family Business Advising and Family Wealth Advising (CFBA/CFWA). These individuals, coming from across the globe and across disciplines, have accessed and completed programs of curated content and research-based resources with their peers and a highly skilled faculty, developing a global network of fellow students who advise and study multi-generational families.

[READ MORE](#)



## DATES TO REMEMBER

NOV  
5

### Midwest Chapter regional meeting | 5:00PM – 7:00PM

70 West Madison, Suite 230, Chicago

Program: Optimizing the Human Potential of M&A Transactions: Planning for the “unexpected people problems” for ultimate deal success

[VIEW DETAILS](#)

NOV  
14

### NYC regional meeting | 4:30PM-7:00PM

Host: J.P. Morgan, 390 Madison Avenue, New York City

Program: Master Class with Justin Blake, Edelman, “Implications on Trust for Family Businesses”

[VIEW DETAILS](#)

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](#)