



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Something for everyone!

SEPTEMBER 06, 2019



By now we hope you've registered for the FFI annual global conference in Miami, October 23-25, but if you haven't, or even if you have, here are some of the options available in addition to the formal program.

WEDNESDAY, OCTOBER 23

Pre-conference courses: A chance to extend your learning and/or complete an advanced certificate course. These courses are on Wednesday from 9:00AM-4:30PM, ending before the opening keynote and reception.

GEN 503 Tools for Positive Change in Family Business Systems: Analysis and application

This course will include: an overview of family business assessment tools; insights into what to look for, look out for and how to choose family business assessment tools; methods for identifying risks and benefits, challenges and opportunities for professionals using family business assessments; and "hands on" exercises for using assessment tools and discussing them with family business clients.



Andrew Hier
Cambridge Family Enterprise
Group



Carlo Salvato
Bocconi University



Neus Fileu
Lansberg, Gersick & Associates

Gen 504 Meaning and Purpose: Philanthropy and the family enterprise

This course will include presentations and discussions on: current trends in philanthropy and how wealthy individuals and families engage in philanthropy, including the emergent field of Impact Investing; understanding how today's high and ultra-high net worth families express their values and work towards social and environmental impact through philanthropic giving; practical approaches to position philanthropy at the heart of conversations on values, succession planning and preparing the next generation; case studies and reflective exercises.



James Coutre
Fidelity Family Office Services



Maya Prabhu
JP Morgan Private Bank

FFI Iberoamerica Virtual Study Group meeting

El Virtual Study Group Iberoamerica le invita a una serie de exposiciones en español sobre los últimos temas en materia de consultoría, investigación y desarrollo de ideas sobre las empresas familiares en España y Latinoamérica. Acompañenos a descubrir la emoción de los nuevos conceptos y a construir conocimiento junto a los especialistas y profesionales invitados. (This session will be conducted only in Spanish.)



Guillermo Salazar
Moderator
Exaudi Family Business Consulting

THURSDAY, OCTOBER 24

GEN Award Breakfast

Join colleagues to recognize and congratulate GEN certificate program graduates, new FFI Fellows, and GEN scholarships recipients.

Lunch and Learn

Beyond the formal program, these sessions allow attendees to enjoy lunch and learn more on certain specific topics.

LGBTQIA ISSUES IN FAMILY ENTERPRISE ADVISING

This informal gathering provides an opportunity for conference participants to discuss issues they have encountered—either in their advisory practices or personally—in dealing with lesbian, gay, bisexual or transgender aspects of advising family enterprises. Focus will be on developing best practices in this area.



Kyle Danner

KD1 LLC

RESEARCH REPORT: STUDENT SATISFACTION AND LOYALTY IN PROFESSIONAL FAMILY BUSINESS EDUCATION – THE ROLE OF INTERACTIONS AND VALUE CO-CREATION

Specialised business education is vital for the growth and sustainability of future generations of family firms. In our study, a theoretical model focusing on the relationships between learner interactions during family business education, and the perceived value, student satisfaction and loyalty is proposed and tested utilising a sample of 242 FFI students. Join the researchers to find out what the study results show re learner-learner interaction to enhance and promote value co-creation.



Anthony Devine

University of Northumbria

STEP PROJECT GLOBAL REPORT PRESENTATION – IMPACT OF CHANGING DEMOGRAPHICS ON FAMILY FIRMS' SUCCESSION AND GOVERNANCE

With people living longer, the traditional methods of transition and governance in family businesses are no longer appropriate. The 2019 STEP Project Global Report, based on more than 1,800 family business respondents from all over the world, explores and articulates how business families are dealing with these issues and what succession and governance models could look like in the modern era across different world regions.



Prof. Andrea Calabrò

STEP Project Global Academic Director
IPAG Family Business Institute (IFBI), IPAG Business
School



Prof. Alfredo Valentino

STEP Project Global Research Champion
Associate Professor at ESCE International Business
School

Starry Night Gala Awards

Spend the evening poolside under the stars as we recognize and celebrate the 2019 FFI Academic and Achievement Award winners.

Open to all registrants but pre-registration required.

FRIDAY, OCTOBER 23

GEN Alumni & Fellows Breakfast

An invitation only breakfast for all FFI Fellow and GEN grads attending the conference.

Pre-registration required.



Annual Meeting

Hear reports, greet new board members and enjoy lunch at the FFI Annual Meeting.



David Harvey
FFI Board Chair

Kick off to 2020 in NYC

Sponsored by Pitcairn

PITCAIRN



October 28-30 at the Marriott
Marquis



PROGRAM COMMITTEE CO-
CHAIR

Linda Bourn
Crystal, Alliant Private Group



PROGRAM COMMITTEE CO-
CHAIR

Marta Widz
IMD

Don't forget to cast your vote in the 2019 FFI Board of Directors Elections.

Voting closes at midnight ET on September 9.

[VOTE ONLINE](#)

PREVIOUS EDITION



In this issue of *FFI on Friday* we are pleased to introduce the 2019-2021 UK/Europe Regional Planning Committee. This is a new FFI committee that held its first meeting in March 2019 at KPMG in London. It was hosted by KPMG Enterprise Centre of Excellence for Family Business program director, Daniel Trimarchi.

[READ MORE](#)



DATES TO REMEMBER

SEP
11

New England Chapter Breakfast

Breaking Log Jams: Resolving Sustained Conflicts in Family Enterprise

Host: Burns and Levinson, 125 Summer St., Boston, MA

[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

[VIEW DETAILS](#)

OCT
23-25

Annual Global conference in Miami

[VIEW COMPLETE PROGRAM AND REGISTER](#)

[VIEW HOTEL RESERVATIONS](#)