

PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Something for everyone!

**SEPTEMBER 06, 2019** 



**B** y 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. Acompáñenos 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



#### **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.

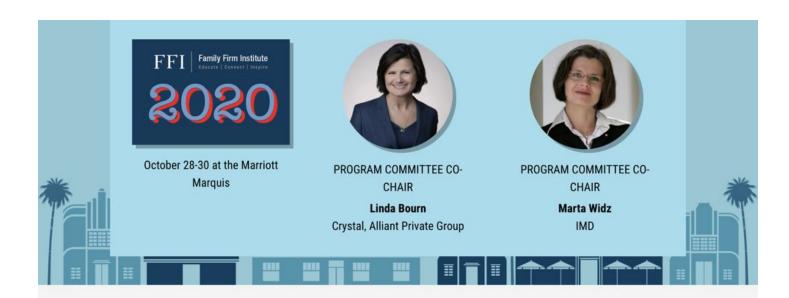


David Harvey FFI Board Chair

#### Kick off to 2020 in NYC

Sponsored by Pitcairn

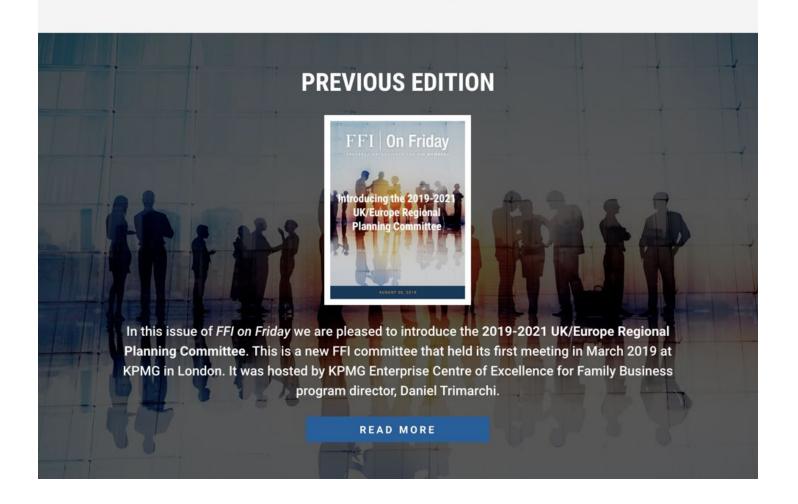




### Don't forget to cast your vote in the 2019 FFI Board of Directors Elections.

Voting closes at midnight ET on September 9.

VOTE ONLINE



### **DATES TO REMEMBER**

SEP 11

#### **New England Chapter Breakfast**

 $\label{lem:conflicts} \textbf{Breaking Log Jams: Resolving Sustained Conflicts in Family Enterprise}$ 

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

VIEW DETAILS

\$EP 15 Last day to submit proposals for the  $4^{\rm th}$  Review Issue of Family Business Review (FBR)

VIEW DETAILS

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#### 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

23-25

#### Annual Global conference in Miami

VIEW COMPLETE PROGRAM AND REGISTER

**VIEW HOTEL RESERVATIONS** 

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