



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the FFI Organizational Members – Part V

SEPTEMBER 20, 2019



Today, in our first fall installment of this year's FFI Organizational Members Series, we are pleased to feature six distinguished organizations and educational institutions that are FFI organizational members.

CAMBRIDGE FAMILY ENTERPRISE GROUP



Cambridge Family Enterprise Group, founded in 1989, is a highly specialized, international advisory firm serving family enterprises. It is devoted to helping families achieve multi-generational success for their families, enterprises, and financial wealth.

FFI members are FFI Fellow John Davis, who is recipient of the 2016 Richard Beckhard Practice Award, a founding board member of FFI, and founder and chairman of CFEG; Dan Frosh (CFBA, CFWA), who is on the FFI Board of Directors; Alan Heath (CFBA); Katherine Heath; FFI Fellow Andrew Hier; Helena McDonnell; and Maria Sinanis.



Andrew Hier

Join GEN 503 faculty member Andrew Hier in Miami at the **FFI Global Conference** for "Tools for Positive Change in Family Business Systems: Analysis and Application."

Register for GEN 503 in Miami.

[LEARN MORE](#)



John Davis

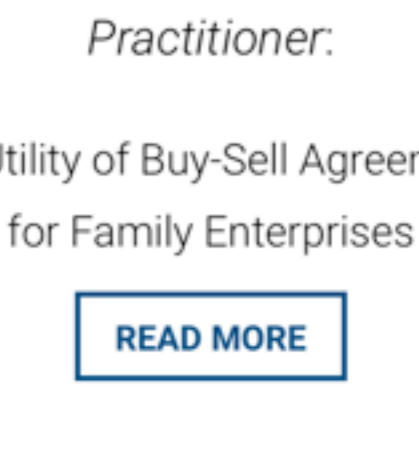
Read *FFI Practitioner* interviews with John Davis:

Celebrating the 40th Anniversary of the Three-Circle Model: An interview with John Davis

[READ NOW](#)

The Future of the Three-Circle Model: A conversation between Pramodita Sharma and John Davis

[READ NOW](#)



Dan Frosh

Read Dan's article in *FFI Practitioner*:

The Utility of Buy-Sell Agreements for Family Enterprises

[READ MORE](#)

CLERE CONSULTING



Clere Consulting is a valuable resource for family business leaders and their advisors seeking to transition the next generation into positions of responsibility. Given the breadth of the firm's background in addiction and behavioral health, as well as the team's experience and knowledge of family business systems and dynamics, Clere provides family businesses with effective solutions to achieve their succession goals.

FFI members are Samuel N. Dresser, Douglas C. Lyons (CFBA), Amy J. Prouty, and Eve M. Ruff



Sam Dresser

Read a Q&A with Sam Dresser.

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Doug Lyons

Read a Q&A with Doug Lyons.

[READ NOW](#)

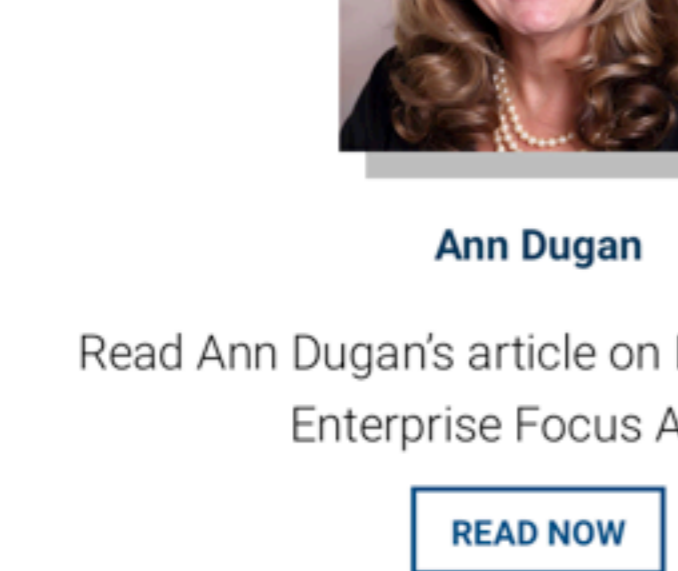


Amy Prouty

Read a Q&A with Amy Prouty.

[READ NOW](#)

FAMILY OFFICE EXCHANGE



Family Office Exchange (FOX) is a peer-to-peer network for ultra-wealthy families and their family offices and advisors who utilize FOX's resources for advice, networking, education, and best practices in wealth management.

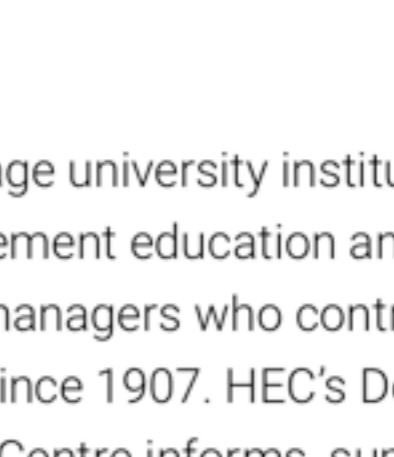
FFI members are Ann Dugan, FFI Fellow, former FFI board member, and 2013 recipient of the Barbara Hollander Award; Charles B. Grace III; Sara Hamilton, firm founder and CEO; and Glen Johnson.



Ann Dugan

Read Ann Dugan's article on Five Key Family Enterprise Focus Areas.

[READ NOW](#)



Glen Johnson

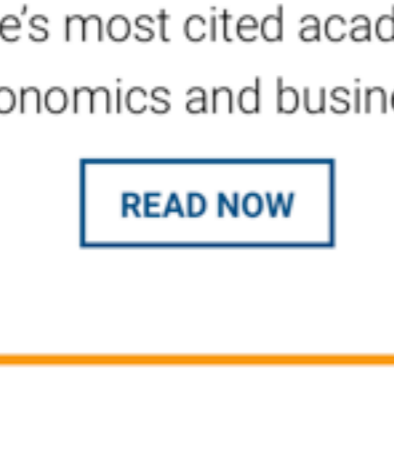
Join Glen Johnson for an upcoming **Family Office Exchange (FOX) webinar** that will share emerging industry trends and outline implications for families and their advisors.

HEC MONTRÉAL



HEC Montréal is a French-language university institution offering internationally renowned management education and research. The school has been training future managers who contribute to society's growth and prosperity since 1907. HEC's Deschênes Molson Lesage Family Business Centre informs, supports, coaches and assists family businesses in the planning and transition process, as well as in the governance and development of the businesses themselves.

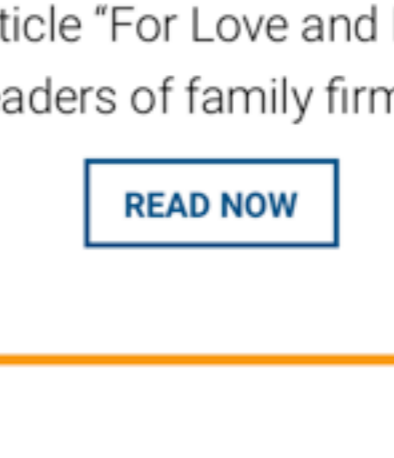
FFI members are Annie Veilleux, director of the Deschênes Molson Lesage Family Business Centre; Luis Felipe Cisneros Martinez; FFI Fellows Danny Miller and Isabelle Le Breton-Miller, co-recipients of the 2017 Barbara Hollander Award and of the 2007 and 2009 Best Unpublished Research Paper Awards.



Danny Miller

Read about Danny Miller's inclusion on the list of Web of Science's most cited academic articles in economics and business.

[READ NOW](#)



Isabelle Le Breton-Miller

Read Isabelle Le Breton-Miller's popular *FFI Practitioner* article "For Love and Money: Married leaders of family firms."

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THE FAMILY BUSINESS CENTER AT LOYOLA UNIVERSITY CHICAGO



The Family Business Center is a community of business-owning families dedicated to learning and sharing knowledge to repair, sustain, and grow successful family businesses. The Center's mission is to help family businesses navigate complex generational transitions, strengthening both their family and business.

FFI members from Loyola are Jennifer Griffin; Gezinus Hidding; FFI Fellow and 2018 recipient of the FFI Interdisciplinary Achievement Award, Andrew Keyt; and Anne Smart (CFBA).



Andrew Keyt

Andrew Keyt will be a featured speaker at the September 26 Loyola University Learning Journey event.

[VIEW DETAILS](#)

WELLS FARGO PRIVATE BANK



Wells Fargo Private Bank is a leading provider of wealth management services, dedicating to clients through multidisciplinary teams, committed to understanding, analyzing, and evolving an integrated wealth plan that addresses both quantitative and qualitative issues. Advisors help the family engage in conversations surrounding shared values, the preparation of heirs, and family decision-making processes.

FFI members are Katherine Dean, Head of Family Dynamics; Suzanne Mansell; Mariana Martinez; Gary Shunk (CFBA, CFWA); and David Specht, National Development Manager for Family Dynamics.



Katherine Dean

Read Katherine Dean's most recent blog post for Kiplinger.

[READ NOW](#)



Mariana Martinez

Read Mariana Martinez's article in English and in Spanish on "Eight Strategies for Conflict Management in Family Meetings."

[READ NOW](#)



Read the full report on Children of Millionaires – What Matters Most

[READ NOW](#)

PREVIOUS EDITION



We are extremely pleased to feature an exclusive interview with Dr. Kris Verburgh, who will be leading a master class in London on September 24 and giving the opening keynote presentation at the Miami conference on October 23. The topics discussed here and at these two educational events are on the forefront of science, business, philanthropy, scholarly research, and much more. We hope you enjoy this unique, interdisciplinary achievement.

[READ MORE](#)

DATES TO REMEMBER

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](#)

SEP 25

Midwest Chapter Event
Host: Levin Ginsburg, 180 N. LaSalle St., Chicago
Program: "Trials of an Expert Witness"

[VIEW DETAILS](#)

SEP 27

Last day to make Miami conference hotel reservations at the FFI rate

[BOOK ONLINE](#)

OCT 1

Q4 Enrollment for GEN Certificate Program opens

[VIEW DETAILS](#)

OCT 23-25

Annual Global conference in Miami
[VIEW COMPLETE PROGRAM AND REGISTER](#)
[VIEW HOTEL RESERVATIONS](#)

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"

NOV 22

"Building Family Business Boards for the Long Term"
STEP Business Families Special Interest Group in London

[VIEW DETAILS](#)