



PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the FFI chair

FEBRUARY 21, 2020



Dear Colleagues,
I am pleased to report that the FFI board of directors and the 2020 Global Conference planning committee held a series of meetings earlier this month to further the strategic goals of the organization and to put in place the final plans for the October 28–30 conference in New York at the Marriott Marquis in Times Square.

Here are some highlights.

2020 CONFERENCE PROGRAM COMMITTEE AND REGIONAL MEETING

The 2020 Program Committee met on Wednesday and Thursday, February 5 and 6, to review more than 80 excellent proposals from more nearly 100 applicants from around the world. The final program will be announced in March, but meanwhile, thanks to the committee members listed below.



Linda Bourn, co-chair
Crystal, Alliant Private Client



Marta Widz, co-chair
IMD Global Family Business
Center



Amy Hart Clyne
Pitcairn



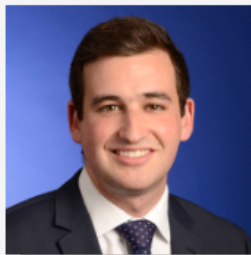
Whitney Johnson
O'Connor Professional Group



Mark Rubin
Geller Advisors LLC



Pilar Tolentino
Ateneo de Manila University



Daniel Trimarchi
KPMG



Bilal Zein
Quanon Capital Ltd.

On Thursday evening we hosted nearly 100 members and friends at a regional reception. We were especially pleased to welcome a large group of Bocconi University alumni in the New York City area.

**If you haven't already registered for the global conference, go here
to take advantage of the Spring Special conference rate.**

[REGISTER FOR THE 2020 CONFERENCE](#)

BOARD RETREAT

The board retreat began on Friday and ended on Saturday afternoon, February 8. Included were reports from our management company, Green Associates, *FBR* Editorial Search Committee chair Carlo Salvato, FFI treasurer Sandra McNeely, and *FBR* editor G. Tyge Payne. Discussions on strategic issues re GEN 2.0, raising patient capital, and 2020 board nominations were led by Vaughan Scott, Maya Prabhu, Fabian Bernhard, and Dan Frosh, respectively.



Carlo Salvato

Bocconi University



Sandra McNeely

Abbey Legacy



G. Tyge Payne

Texas Tech University



Vaughan Scott

Axiom Financial
Strategies Group, LLC



Maya Prabhu

J.P. Morgan Private
Bank



Fabian Bernhard

EDHEC Business
School



Dan Frosh

Cambridge Advisors
to Family Enterprise

Following these discussions, the board created a fundraising and development committee to create a strategy for raising patient capital that can be invested in the further development of initiatives and programs to advance FFI's mission. The committee will be chaired by Lisa Morel.



Lisa Morel

Exaudi Family Business Consulting

The board will meet between now and October via Zoom and in person again in New York in October – where we hope to see many of you at the conference.

It's a pleasure to serve as chair of the board, and I thank the outstanding **board members** who join me in looking after this vibrant organization.



Sincerely,



Debbie Bing

Chair

PREVIOUS EDITION



Today we feature six recent books by FFI members. Please help us continue this periodic feature by letting us know about books we might have missed. They don't have to be in English!

The co-author of Seeing the Blind Spot was inadvertently omitted in last week's edition. Peter Bloom is the co-author with Mariana Martinez for this book. The February 14 issue has been updated with Peter's information.

[READ MORE](#)



DATES TO REMEMBER

FEB
26

Midwest Chapter meeting

Location: Chicago or via Zoom

[LEARN MORE AND REGISTER](#)

MAR
01

Deadline for Best Doctoral Dissertation Award submissions

[VIEW DETAILS](#)

MAR
06

Last day to begin FFI GEN online coursework for Q1 Capstone webinars

[LEARN MORE AND ENROLL](#)

MAR
11

Save the Date for the New England Chapter Breakfast

[LEARN MORE AND REGISTER](#)

APR
15

Last day for the following applications:

Best Unpublished Research Paper Award

[VIEW DETAILS](#)

Nominations for an Achievement Award

[VIEW DETAILS](#)

GEN Scholarships

[VIEW DETAILS](#)