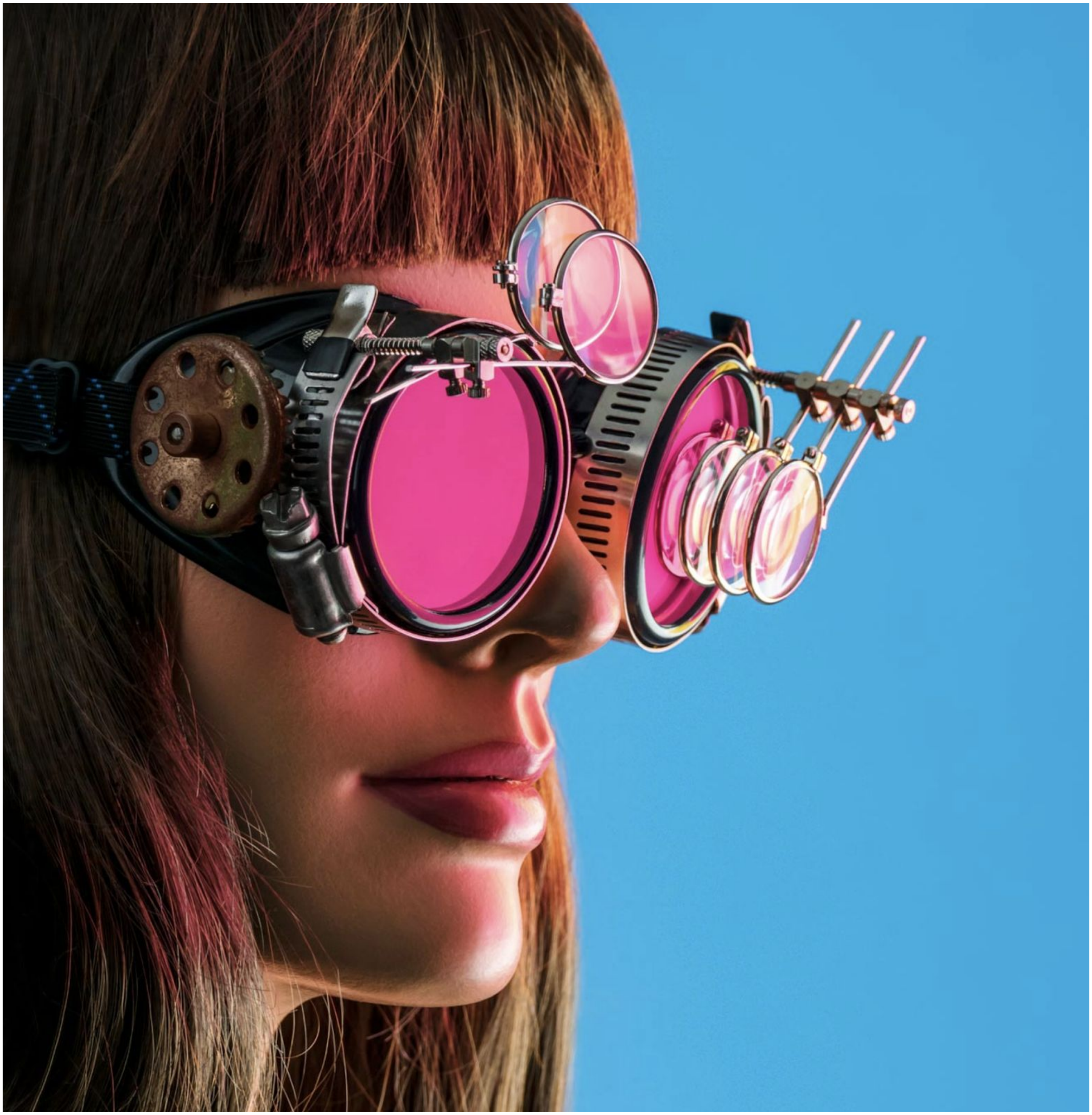
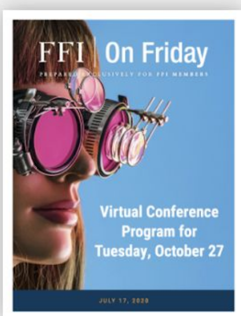


PREPARED EXCLUSIVELY FOR FFI MEMBERS

Virtual Conference Program for Tuesday, October 27

JULY 17, 2020



Following up on the announcement of the hybrid annual global conference program in the July 8 *FFI Practitioner*, we want to provide more detail on the Tuesday day-long event. Of course, we hope members and friends of FFI will also participate in the Monday, October 26, virtual session (GEN 503), but this week we are featuring the exciting program for Tuesday, October 27. All online!

PART A

(8:00AM TO 12:30PM ET)

New Lenses on Classic Topics in the Field of Family Enterprise

These four modules, each with two concurrent sessions, include presentations and discussions on comparative business models, family capital, mental incapacity, multi-family offices, philanthropy, strategy, and more.

Host Room 1: Debbie Bing, chair, FFI Board of Directors
Host Room 2: Carlo Salvato, faculty chair, FFI Global Education Network (GEN)

SESSION 1

Bowen–From Theory to Practice (Room 1)

Presenters: Steve Legler, TSI Heritage, Montreal, Canada; Mariana Martinez, Wells Fargo Private Bank, Washington DC

A Vision for the Future: New Family Enterprise Models (Room 2)

Presenter: Patricia M. Angus, Esq., Angus Advisory Group LLC; Enterprising Families Executive Education, Columbia University Graduate School of Business

SESSION 2

X-Ray Vision: Making culture visible (and an asset) in a family enterprise (Room 1)

Presenter: Todd Smith, CFAR, Inc.

Family Philanthropy: The secret ingredients to making it rewarding and impactful (Room 2)

Presenters: Jim Coutre, Fidelity Family Office, FFI GEN faculty and Maya Prabhu, J.P. Morgan Private Bank, FFI GEN faculty

SESSION 3

Developing a Clear Vision for Growing Your Multi-Family Office (Room 1)

Presenters: Michael Delgass, Wealthspire Advisors; Owen Ryan, Geller Advisors and Mark Rubin, Geller Advisors

Upgrading Your Lenses: Did the prescription change while you weren't looking? (Room 2)

Presenters: Nancy Drozdow and Caleb White, CFAR Inc.

SESSION 4

Helping Family Businesses: The family capital approach (Room 1)

Presenter: Gibb Dyer, Marriott School of Business, Brigham Young University

Understanding the Complexities of Mental Incapacity When Advising Family Business Owners (Room 2)

Presenters: Patricia Annino, Partner, Rimon Law; James Grubman, Family Wealth Consulting; Linda Bourn (moderator), Crystal, Alliant Private Client

PART B

(1:30PM TO 5:30PM ET)

Master Class: Advanced Topics in Family Wealth Advising

These four presentations will be offered sequentially.

Host: Bilal Zein, 2020 Conference Program Committee

SESSION 1

The Blind Spot Preventing Wealth Preservation: Infrastructure

Presenters: Stephen Magowan, Sunrise Management Services, LLC, and Natasha Pearl, Aston Pearl

SESSION 2

Zooming in on Opportunity: Seeing the formula for next generation engagement in family offices and wealth enterprises

Presenters: James Cornell, Fiduciary Wealth Partners, and Katelyn Husereau, CFAR, Inc.

SESSION 3

Values-Based Investing: How to incorporate your values into your investment strategy

Presenters: Jim Coutre, Fidelity Family Office, FFI GEN faculty; Jay Lipman, Ethic Investing, and Maya Prabhu, J.P. Morgan Private Bank, FFI GEN faculty

SESSION 4

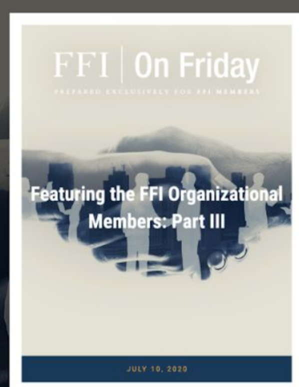
Developing an Expanded View of Family Enterprise Sustainability: Incorporating social and environmental objectives alongside generational goals

Presenters: Fredda Herz-Brown, Relative Solutions; Erika Karp, Cornerstone Capital; Rebecca Meyer (moderator), Relative Solutions

Please note: For those pursuing an Advanced Certificate in Family Wealth Advising from the Family Firm Institute, GEN 504 is incorporated into both virtual A and B. All day participation is required.

VIEW THE COMPLETE PROGRAM AND REGISTER FOR EITHER OR BOTH THE VIRTUAL AND THE IN-PERSON DAYS

PREVIOUS EDITION



We are pleased to continue with a third installment highlighting distinguished organizations and educational institutions that are FFI organizational members.

READ MORE