



PREPARED EXCLUSIVELY FOR FFI MEMBERS

FFI Global Conference: Now a virtual event

JULY 31, 2020



Join us for the **1st Virtual FFI Global Conference!** This three-day event brings together speakers from around the world to share latest research and perspectives on the issues facing families in business and families of wealth.

It's never been more convenient to attend the premier event in the field of family enterprise.



MONDAY, OCTOBER 26

8:00AM-4:00PM ET

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

Presenters: Neus Feliu, Lansberg, Gersick & Associates LLC, FFI GEN faculty and Andrew Hier, Cambridge Advisors to Family Enterprise, FFI GEN faculty

This course is open to all and will count as credit for those pursuing an Advanced Certificate in Family Business Advising from The Family Firm Institute.

[LEARN MORE ABOUT THE ADVANCED CERTIFICATE PROGRAM](#)

[VIEW MORE DETAILS ON THE MONDAY PROGRAM](#)



TUESDAY, OCTOBER 27

(PART A) 8:00AM-12:30PM ET

Debbie Bing, FFI board chair, and Carlo Salvato, GEN faculty chair, are hosts.
(Four concurrent sessions, including those presentations below)

A Vision for the Future: New Family Enterprise Models

Presenter: Patricia M. Angus, Esq., Angus Advisory Group LLC, and Columbia University Graduate School of Business

Bowen—From Theory to Practice

Presenters: Steve Legler, TSI Heritage; Mariana Martinez, Wells Fargo Private Bank

Developing a Clear Vision for Growing Your Multi-Family Office

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

Helping Family Businesses: The family capital approach

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

Family Philanthropy: The secret ingredients to making it rewarding and impactful

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

Understanding the Complexities of Mental Incapacity When Advising Family Business Owners

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

Upgrading Your Lenses: Did the prescription change while you weren't looking?

Presenters: Nancy Drozdow and Caleb White, CFAR Inc.

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

Presenter: Todd Smith, CFAR, Inc.

TUESDAY, OCTOBER 27

(PART B) 1:30PM-5:45PM ET

Bilal Zein, 2020 Conference program committee is host.

(Four sequential sessions as below)

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 Inc.; Rebecca Meyer, Relative Solutions

The Blind Spot Preventing Wealth Preservation: Infrastructure

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

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

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

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

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

VIEW MORE DETAILS ON THE TUESDAY PROGRAM



WEDNESDAY, OCTOBER 28

(PART A) 8:00AM-12:30PM ET

Jennifer East, GEN faculty, and Paul Karofsky, 2086 Society, founding member, are hosts.
(Three concurrent sessions, including those presentations below)

20/20 Vision in Family Philanthropy

Presenters: James Chen, Clearly and The Chen Yet-Sen Family Foundation; Denise Kenyon-Rouvinez, Gen10 SA; Walter Sweet, Rockefeller Philanthropy Advisors

Disappointment and the Fear of Hope: From Theory to Research

Presenters: Ross Ellenhorn, Ellenhorn, LLC

Learning From One's Mistakes: Better is possible

Presenter: Kathy Wiseman, Navigating Systems

Overcoming Psychological Bias with Family Business Governance

Presenter: Randel Carlock, INSEAD

The Power of Family Ownership

Presenters: Josh Baron and Rob Lachenauer, BanyanGlobal Family Business Advisors

Unraveling the Hidden Threads of Family Conflict

Presenters: Jane Beddall, Dovetail Resolutions, LLC; Richard Lutringer, Lutringer Mediation Associates; Jack Wofford, John G. Wofford, Esq.

WEDNESDAY, OCTOBER 28

(PART B) 12:30PM-5:45PM ET

Natalie McVeigh, Virtual Study Group chair, and Tyge Payne, FBR editor, are hosts.
(Four concurrent sessions, including those presentations below)

Ethical Dilemmas of Family Business Members and Their Advisors

Presenters: Rania Labaki, EDHEC Business School; Christopher Robichaud, Harvard Kennedy School of Government; Wendy Ulaszek, Lansberg Gersick and Associates

Family Learning: Why and how

Presenters: Amy Hart Clyne and Genine Iffla, Pitcairn

Financial Independence From the Family Enterprise: A critical factor for effective ownership and management succession

Presenter: Randy Waesche, Resource Management, LLC

From Family in Business to Business Family: The blind spot of family identity

Presenters: Maria Jose Parada, ESADE Business School; Marta Widz, IMD Business School

Promoting Resilience in the Age of Entitlement

Presenter: Diana Clark, O'Connor Professional Group

The Next Generation as “Agents of Change”: How can they earn their license to operate?

Presenters: Francesca Ambrosini, PwC; Peter Englisch, PwC

What really works? Tapping the Wisdom of 100-Year Global Family Enterprises

Presenter: Dennis Jaffe, Wise Counsel Research

VIEW MORE DETAILS ON THE WEDNESDAY PROGRAM



REGISTER FOR ONE SEGMENT, ONE DAY OR THE ENTIRE
CONFERENCE!

REGISTER

To read the July 28 message from FFI board chair Debbie Bing to FFI members on the FFI board's decision to make the conference presentations virtual, go [here](#).

PREVIOUS EDITION



The FFI mentoring program is almost as old as FFI itself and has been incorporated into the certificate program since its inception in 2001. This week we would like to thank and feature the individuals who are currently involved in mentoring, through the GEN Program.

[READ MORE](#)