



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the FFI Organizational Members – Part V

SEPTEMBER 25, 2020



We are pleased to feature the following distinguished organizations and educational institutions that are FFI organizational members.

CAMBRIDGE FAMILY ENTERPRISE GROUP

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; FFI board member Dan Frosh (CFBA/CFWA); Alan Heath (CFBA); Katherine Heath; FFI Fellow and 2020 FFI Interdisciplinary Award recipient Andrew Hier; Helena McDonnell; and Maria Sinanis (CFBA).



John Davis
FFI Fellow

Founding member of 2086 Society



Dan Frosh
CFBA/CFWA

FFI Board of Directors



Alan Heath
CFBA



Andrew Hier
FFI Fellow

Recipient of 2020 FFI
Interdisciplinary Award



Helena McDonnell



Maria Sinanis
CFBA



FIDELIUS FAMILY OFFICE



Fidelius Family Office is a family-office organization for enterprising families throughout the Americas. Fidelius addresses the multiple, interlocking concerns of business families—including family dynamics, governance of both the family and the enterprise, long-term investment strategies, and the family's emotional, physical, and financial health. Based on years of experience and working with hundreds of business families, Fidelius has developed a methodology that allows for analysis of the needs of each family, regardless of its complexity.

FFI members are Luisa Cardona, Lisseth Herrera, Ernesto Lewin, and FFI Fellow and former FFI board member Rodolfo Paiz.



Luisa Cardona



Lisseth Herrera



Ernesto Lewin



Rodolfo Paiz
FFI Fellow

TRUSTED FAMILY



Trusted Family, founded by two next gen members of business owning families, has developed an online communications platform that enables families and family businesses to engage, interact, and collaborate more effectively. The firm brings value to multigenerational family businesses and family offices globally by enhancing their board, shareholder, and family communication and collaboration activities via a secure digital, centralized, and permission-based platform.

FFI members are Maria Braganca, Arnaud de Coninck, Bert Goethals, Bitu Hedayati, Neel Mullick, Elvira Orza, Edouard Thijssen, and Sofia Vollmer.



Maria Braganca



Arnaud de Coninck



Bitu Hedayati



Neel Mullick



Elvira Orza



Edouard Thijssen

WEALTH MANAGEMENT INSTITUTE, LTD.



The **Wealth Management Institute (WMI)** is Asia's Centre of Excellence for wealth and asset management education and research. Established in 2003 with the support of Temasek and GIC, WMI is driven by the vision to catalyze Singapore's growth ambition to become a leading international asset and wealth management center. As part of its growing commitment to nurture talent and serve the growing family office segment, WMI is proud to line up a suite of programs for the professionals as well as the families.

FFI members are chief executive officer, Foo Mee Har, and director of program development, Janice Poon.



Foo Mee Har



Janice Poon

WELLS FARGO PRIVATE BANK



Wells Fargo Private Bank is a leading provider of wealth management services, meeting the needs of clients through multidisciplinary teams dedicated 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 (ACFWA); Gary Shunk (CFBA/CFWA); and David Specht.



Katherine Dean



Suzanne Mansell



Mariana Martinez

ACFWA

Presenting at the **2020 Global Conference**



Gary Shunk

CFBA/CFWA



David Specht

FFI ORGANIZATIONAL MEMBERS

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FFI is the leading association worldwide and the organization of choice for advisors, consultants, educators, researchers, and family enterprise members who help perpetuate trans-generational family business wealth.

Please read on for previous editions featuring our organizational members.



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PREVIOUS EDITION



An invitation from the 2020 Program Conference Program Committee.

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DATES TO REMEMBER

SEP
25

Cast your vote in the 2020 Board of Directors election before midnight EDT on September 25.

[VOTE ONLINE](#)

OCT
5

Last day to register for the 2020 Virtual Global conference. Space is limited, so don't delay.

[VIEW DETAILS](#)

NOV-DEC
30-4

STEP Business Families Special Interest Group Spotlight Sessions