



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Coming in September – Register Now

AUGUST 20, 2021



As August draws to a close, we'd like to remind everyone of two phenomenal courses from our GEN program that will be open to anyone interested this year. Typically, these courses are reserved for people enrolled in the Advanced GEN Certificate program but given the ongoing uncertainty about travel and the equally ongoing desire for professional education, we want to be certain all FFI members are aware of this opportunity.

And...as a reminder, we still plan to be in-person in London at the end of October, so [register](#) if you know you can make it. Or [here](#) if you want to attend the October 18 and 19 virtual sessions and continue online.

**SEPTEMBER 14 AND 15**  
**(half-day virtual seminars each day from 8 AM EDT – 12 Noon EDT)**

**Philanthropy, Investing and the Enterprise:  
Advising families in pursuit of impact**

**Concepts include:**

- understanding how today's wealthy individuals, families, and their family offices express values and work towards social and environmental impacts through philanthropic giving, operating businesses, and investments (including impact investing)
- identifying practical approaches, both relevant and rigorous, to position philanthropy at the heart of conversations on values, succession planning, and preparing the next generation
- presenting practical approaches to help your clients shape their philanthropy as a family and develop tools to engage the rising generation
- understanding how leading business families incorporate environmental, social and governance goals in their operating businesses
- understanding the spectrum of sustainable investment opportunities and how clients can get started – from impact and thematic investing to responsible investment in the public and private markets

*Opportunities for debate, case studies and reflective exercises to enhance learning will be included.*

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**Faculty**

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**James Coutre ACFBA, ACFWA**



James Coutre is vice president of Insights and Connections at Fidelity Family Office Services in Boston. Prior to joining Fidelity, he was a partner at The Philanthropic Initiative (TPI). Recently Jim lead two summers school sessions of *FFI on Monday*.

**Maya Prabhu FFI Fellow**



Maya Prabhu is Managing Director and Head of Wealth Advisory for J.P. Morgan Private Bank. She is a member of the FFI board of directors and the 2086 Society.

**REGISTER HERE**

**SEPTEMBER 21 AND 22**

**(Two half-day virtual seminars each day from 8 AM EDT – 12 Noon EDT)**

## **Tools for Positive Change in Family Enterprise Systems: Analysis and application**

### **Concepts include:**

- An overview of family enterprise tools, frameworks, and techniques for analyzing Family Enterprise cases, achieving positive change and ultimately, dealing with the complex issues that consultants face when assisting family enterprises.
- The seminar will present a sample of tools that serve different purposes such as a) analyzing the needs and challenges facing the family enterprise system; b) the development of key governance elements, including a values and mission statement, family communication policy, family member employment policy; and c) helping to facilitate different interventions, including the eruption of conflict.
- Through the seminar, students will gain insight into the skills required for family enterprise professionals to adequately apply and eventually achieve positive change for their clients.
- A unique feature of this seminar is the “hands on” approach, devoting an important part of the course to group dynamics, shared analysis, and role-playing exercises in a safe learning environment.
- One of the main goals is learning how a careful application of appropriate tools assists in the development of valuable collaborative progress among family enterprise participants.

### **What to expect for the two-half-day seminar:**

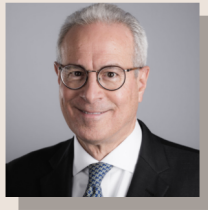
The seminar is a combination of theory and practice, weighted towards the practical. Interwoven with the introduction of concepts and tools by the faculty are practical exercises in working groups or break-out rooms, report-outs to the full assembly with invited questions and commentary, all leading to relevant individual and group learning.

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## Faculty

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### Andrew Hier FFI Fellow



Andrew Hier is a senior partner with Cambridge Advisors to Family Enterprise where he assists clients with ownership, business, and family issues, including development of the next generation and conflict management. He is the 2020 recipient of the FFI Interdisciplinary Award.

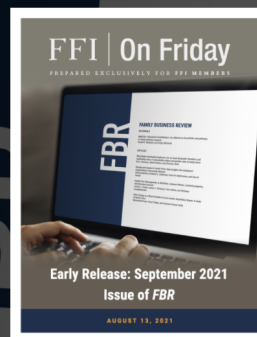
### Neus Feliu FFI Fellow



Dr. Neus Feliu is a consultant, researcher, and educator in the area of family enterprises. She is a partner at Lansberg, Gersick & Associates LLC, a global professional advisory firm supporting the world's leading family enterprises on all aspects of governance and continuity, often as they face complex generational transitions. Neus is a member of the 2022 Conference Program Committee.

[REGISTER HERE](#)

## PREVIOUS EDITION



We are pleased to provide you with an advance look at the September 2021 issue of *Family Business Review (FBR)*.

As an FFI member, you have access to the complete library of *FBR* articles at no charge.

To access back issues of *FBR*, follow these instructions:

1. Log in to your FFI member account
2. Then click: [my.ffi.org/page/family-business-review](https://my ffi.org/page/family-business-review)
3. Click the link on this page to go to *Family Business Review* and you will automatically be redirected and logged in to *FBR* to begin reading.

[READ MORE](#)

## DATES TO REMEMBER

AUG  
23

*FFI on Monday Summer School with Lisa Morel*

[LEARN MORE AND ENROLL](#)

AUG  
28

**DEADLINE EXTENDED** Last day to make London conference hotel reservations in the FFI room block

[VIEW ACCOMMODATIONS](#)

AUG  
30

*FFI on Monday Summer School with Carlo Salvato*

[LEARN MORE AND ENROLL](#)

SEPT  
14-15

GEN 504 Philanthropy, Investing, and the Enterprise

[LEARN MORE AND ENROLL](#)

SEPT  
21-22

GEN 503 Tools for Positive Change in Family Business Systems

[LEARN MORE AND ENROLL](#)

OCT  
18-19

2021 FFI Virtual Conference

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OCT  
21-22

2021 FFI In-Person Conference

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