



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Congratulations to the Q4 Graduates

DECEMBER 17, 2021



Today, we recognize the accomplishment of the 2021 Q4 GEN graduates and Fellows.

These individuals, coming from across the globe and across the disciplines, have accessed and completed programs of curated content and research-based resources with their peers and a highly skilled faculty, developing a global network of fellow students who advise and study multi-generational families.

Please join us in congratulating their outstanding achievement.

CFBA and CFWA Certificate Graduates



Esiri Agbeyi
PwC
Lagos, Nigeria
CFBA



Betsey Fortlouis
InnerWill Leadership
Institute
Richmond, VA
CFBA



Kjartan S. Jansen
Graddha, LLC
Mill Valley, CA
CFBA



Heinrich Liechtenstein
IESE
Barcelona, Spain
CFBA



Naushad Merchant
Merchant Capital Partners
AG
Walchwil, Switzerland
CFWA



Carol Mushriqui
JP Morgan Private Bank
London, United Kingdom
CFBA



Donald P. Opatrny
The Lovins Group
Guilford, CT
CFWA



Dennis Owusu Oteng
Labianca Company, Ltd.
Accra, Ghana
CFBA



Karin Zambrano
Proeza
Monterrey, Mexico
CFBA

Dual Certificate (CFBA/CFWA) Graduates



Kelly Garcia Arrillaga
First Republic Investment
Management
San Diego, CA



Luisa Cardona
FideliUS Guatemala
Guatemala City, Guatemala



Kimberly Christine Sly Go
JSG Group of Companies
Manila, Philippines



Ho Wei Kee
Lombard Odier
Singapore



Kristin Keffeler
Illumination360
Niwot, CO



Alexander Koeberle-Schmid
PwC Germany
Berlin, Germany



Lynn Lee
Golden Equator Wealth
Singapore



Ernesto Lewin
FideliUS Guatemala
Guatemala City, Guatemala



Margaret Liu
First Republic
Bellevue, WA



Anne Philipsen
UBS Switzerland AG
Zürich, Switzerland



Julie Rousseau
The Atwood Group
First Republic Investment
Management
Natick, MA



Ping (Renee) Zhao
Independent advisor
Manly, Australia



Jin Zheng
Hong Kong Noble Wealth Management Limited
Hong Kong

Advanced Certificates and Fellows



Massimo Bau†
Jönköping International Business School
Jönköping, Sweden
2021 Fellow



Monika Hudson
University of San Francisco
San Francisco, CA
ACFBA



Rodolfo Lou*

ActionCoach Business Coaching
Guatemala City, Guatemala
ACFBA



Anne Prenez§

HSBC UK
London, United Kingdom
ACFWA

**Also completed CFBA in Q4*

§Also completed CFWA in Q4

‡Also completed ACFBA in Q4

Thanks to the Q4 GEN Certificate Faculty

GEN 102: Systems Thinking for the Family Enterprise Advisor

Ian Macnaughton, Helena von der Esch

GEN 201: The Action Research Model as Applied to Family Enterprise Advising

Daphne McGuffin

GEN 202: Advising the Family Wealth System: A Multidisciplinary Approach

Richard Boyce, Vaughan Scott

GEN 501: Evidence-Based Advising: Using Research to Empower Family Enterprises

Daphne McGuffin, Natalie McVeigh

GEN 502: Family Governance in the Family Enterprise: A Key Structural Element in Family Enterprise Governance

Jennifer East

DATES TO REMEMBER



December 31

Last day to register at the Year End Special rates

ORGANIZATIONAL MEMBER REGISTRATION

**INDIVIDUAL MEMBER REGISTRATION
(INCLUDES CONSULTANTS AND SPEAKERS
LISTING)**

January 28

Last day to submit a proposal for the 2022 conference

SUBMIT YOUR PROPOSAL

PREVIOUS EDITION



The second report from the 2086 Society grant recipients is now available. Read on for “The Governance Marathon: Dynamic Durability in Entrepreneurial Families amid Disruptions” by 2020 grant recipients Jeremy Cheng, Kevin Au, Marta Widz and Marshall Jen.

READ MORE