



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the FFI Organizational Members – Part II

FEBRUARY 26, 2021



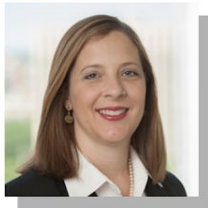
**T**oday, in our second issue of this year's series, we are pleased to feature seven distinguished organizations and educational institutions that are FFI organizational members.

## CFAR



Originally a research center inside the Wharton School, **CFAR** is a private management consulting firm that has served the entire family enterprise from offices in Philadelphia and Boston for four decades. CFAR helps family enterprise leaders address complex issues at the intersection of economics and relationships, including strategy, succession, governance, conflict resolution, and leadership development.

FFI members include FFI Fellow and current FFI board chair Debbie Bing; FFI Fellow, 2012 Richard Beckhard Practice Award recipient, and 2086 Society member Nancy Drozdow; Megan Helzner; Katelyn Husereau (CFBA); Todd Smith; and Caleb White.



**Debbie Bing**  
FFI Fellow



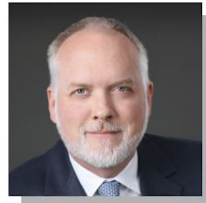
**Nancy Drozdow**  
FFI Fellow



**Megan Helzner**



**Katelyn Husereau**  
CFBA



**Todd Smith**



**Caleb White**

[READ DEBBIE BING'S LETTER "FROM THE FFI CHAIR"](#)

[READ NANCY'S MOST RECENT PRACTITIONER ARTICLE](#)

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## CLERE CONSULTING



**Clere Consulting** is a valuable resource for family business leaders and their advisors seeking to transition the next generation into positions of responsibility. Given the breadth of the firm's background in addiction and behavioral health, as well as the team's experience and knowledge of family business systems and dynamics, Clere provides family businesses with effective solutions to achieve their succession goals.

FFI members are Samuel N. Dresser, Douglas C. Lyons (CFBA), Amy Prouty, and Eve Ruff.



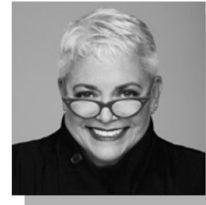
**Samuel N. Dresser**



**Douglas C. Lyons**  
CFBA



**Amy Prouty**



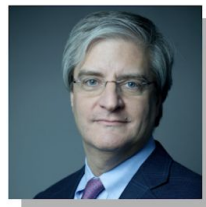
**Eve Ruff**

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## GELLER ADVISORS LLC

**GELLER & COMPANY**  
**GELLER ADVISORS**

**Geller Advisors**, a wholly-owned subsidiary of Geller & Company, provides financial services to high-net-worth individuals, families, non-profit foundations and operating businesses. The firm is currently comprised of over 100 professionals who deliver a wide array of services, including investment management, CFO services, tax advisory services, real estate services, aviation services, and philanthropic services. Members include FFI Fellow Mark B. Rubin, former FFI board member and member of the 2020 conference program committee.



**Mark B. Rubin**  
FFI Fellow

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# IMD GLOBAL FAMILY BUSINESS CENTER



**IMD Global Family Business Center** was founded in 1988 in Lausanne, Switzerland. Today, the Center of Excellence operates from campuses in Lausanne and Singapore and delivers off-site programs worldwide. Dedicated to the issues facing family businesses, family offices, and family foundations, the Center helps clients ensure the sustainable success of business and family, whether large or small. FFI members are Virginie Boillat-Carrard, Matthew Crudgington (CFBA), Malgorzata Kurak, Lise Møller (CFBA), and Peter Vogel. Lise is a member of the 2021 Achievement Awards Committee.



**Virginie Boillat-Carrard**



**Matthew Crudgington**  
CFBA



**Malgorzata Kurak**



**Lise Møller**  
CFBA



**Peter Vogel**

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## RELATIVE SOLUTIONS, LLC

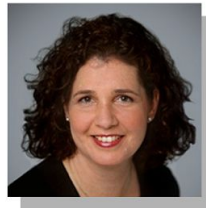


**Relative Solutions, LLC** is a strategic partner with families as they manage changes such as generational transitions in their family enterprise. Whether working with a family on the meaning and impact of wealth, or on issues of governance, strategic planning, and philanthropy, the firm helps families to achieve their stated goals.

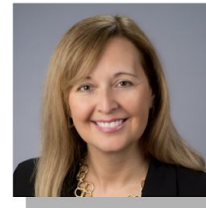
FFI members are Carolyn Greenspon, Rebecca Meyer, Cathy Holuk, Bryn Mars Monahan, and FFI founding member Fredda Herz Brown. Fredda is also an FFI Fellow, recipient of the 1996 Barbara Hollander Award, the 2002 Richard Beckhard Practice Award, and a mentor in the GEN program. Fredda is a founding member of the 2086 Society as well.



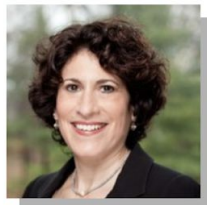
**Fredda Herz Brown**  
FFI Fellow



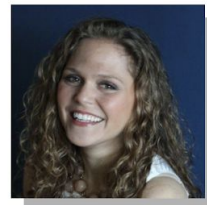
**Carolyn Greenspon**



**Cathy Holuk**



**Rebecca Meyer**



**Bryn Mars Monahan**

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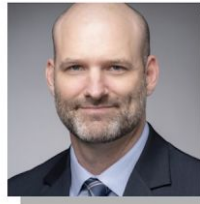
## WILMINGTON TRUST



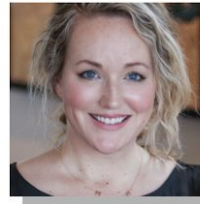
The **Wilmington Trust Emerald Advisory Services** team provides strategic transition planning services and solutions for successful families and business owners through planning and advisory services, family office services, and estate and trust settlement services. Designed for families with complicated wealth management concerns, the Emerald Advisory team is comprised of a diverse group of highly credentialed, experienced, and innovative professionals with prominent industry designations. Wilmington Trust's FFI Members include Jerry Inglet, John Mongold, Libby Turner, and Marguerite Weese.



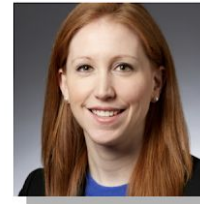
**Jerry Inglet**



**John Mongold**



**Libby Turner**



**Marguerite Weese**

## PREVIOUS EDITION



We are pleased to feature the following distinguished organizations and educational institutions that are FFI organizational members for 2021. This issue will be the first in a continuing series throughout the year.

[READ MORE](#)

## DATES TO REMEMBER

MAR  
01

**Deadline for Best Doctoral Dissertation Submissions**

[VIEW DETAILS](#)

**Last day to enroll in GEN Q1 courses**

[LEARN MORE AND ENROLL](#)

MAR  
10

**Midwest Chapter Event**

[LEARN MORE AND REGISTER](#)

MAR  
31

**Last day to enroll in the C&S Directory for April 01, 2021 – March 31, 2022**

[LEARN MORE AND ENROLL](#)

APR  
12 –  
13

**GEN virtual seminar: Tools for Positive Change in Family Enterprise Systems:  
Analysis and application**

[LEARN MORE AND ENROLL](#)

APR  
15

**Last day to apply for the Best Unpublished Research Paper Award**

[VIEW DETAILS](#)

**Last day to submit nominations for an Achievement Award**

[VIEW DETAILS](#)

**Last day to apply for GEN scholarships**

[VIEW DETAILS](#)

APR  
19 –  
20

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

[LEARN MORE AND ENROLL](#)