



PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the FFI Chair

JANUARY 08, 2021



Dear FFI colleagues,
As we close one of most unique years in our thirty-plus-year history, I have been reflecting on how grateful I am for the collegiality, source of energy and learning, opportunity for deepening connection, and impact in the field that FFI has consistently provided. While just about everything has been different than expected in 2020--from more consecutive non-travel days in a decade to kicking off the first conference in my Chair role from my home office--FFI's commitment to advancing its vision to **Educate, Connect, and Inspire** has remained steadfast.

For several years prior to COVID-19, the FFI leadership has been working on strategic plans and initiatives to enhance our contributions and impact the field of family enterprise consulting, research, and education. The pandemic has accelerated our strategic planning and fueled several important steps, putting us in a position to succeed in 2021 and well beyond.

Here is what we're planning at the board level to advance our strategic initiatives.

Accelerate and integrate our efforts to foster applied research

- Our flagship research publication, *Family Business Review*, welcomes a new editor this month. Don Neubaum will take the helm, joined by 11 associate editors and seven individuals on the Applied Research Board to further the initiatives and outreach of the journal in the coming three years.
- The 2086 Society continues with its second grant, specifically encouraging applied research in the field of advising. This year's recipients are Jeremy Cheng, Kevin Au, and Marshall Jen from the Chinese University of Hong Kong. This initiative will be reviewed and refined in 2021 by the board Task Force on Priority Topics.
- Our weekly digital journal, *FFI Practitioner*, has exceeded our expectations on so many levels that it now needs a new look and approach to expanding its readership, and the FFI Board has appointed a Task Force to do just that! The primary challenge for the Task Force is to recommend ways to extend the reach of this publication to a much larger audience.

Advance academic partnerships

- In 2021 the conference planning committee will be joined by the Cambridge Judge School of Business as the academic host, and in 2022 the Boston conference committee will be working closely with MIT Sloan School of Management as the academic host. There is much more that we can do with, and learn from, these outstanding educational centers in the coming years. This topic will be addressed by the board's Task Force on Priority Topics.

Continue to be a world-class home for professionals and academics, with an expanded focus to include more family office professionals

- As we continue our efforts to lead the way as the organization of choice for advisors and academics, we will spend time this year focusing on our offerings to the family office community. Our experiences in this year's virtual conference and with our GEN certificate program have highlighted how much the family office world has grown, and how increasingly complex and sophisticated it has become. Many of our members touch this world already, and we would like to explore how FFI can be an even better resource for the broader family office network. To this end, the board is creating a Task Force on the Family Office that will make recommendations in the second quarter of 2021 that will result in new family office initiatives going forward. If you are interested in participating, please email judy@ffi.org.

Enhance our offerings with upgraded technology to serve our global community

- There is much to be done here beyond upgrading the GEN program and the Virtual Conference model. We learned a lot in 2020 and are committed to continuing to improve the ways in which we enable members around the world to connect with each other. Members with technological backgrounds, particularly in the community-building area, are asked to contact Judy Green (judy@ffi.org) with ideas before the end of January when the Task Force on Priority Topics will convene.

Leverage our experience in online education

- In 2012, FFI became one of the first professional associations to launch an integrated, curated certificate program (Global Education Network) for family enterprise professionals. (Go [here](#) to see the impressive graduates and the outstanding faculty from 2020.) Now our GEN program is ripe for expansion. In 2020 we refined the current core certificate curriculum and came up with a new model for the advanced certificate program. The new, modular, advanced certificate program will be launched later this year and will continue our cutting-edge initiatives in this area.
- Later in the 2021 we will reinstitute our popular *FFI on Monday* series, which was open to any enrollee worldwide. These webinars were well-received, and many of our members graciously participated as webinar leaders on rather short notice. Going forward we will give additional thought to this initiative and how it should be organized.

As we look ahead to 2021 and beyond, we realize that we will face many opportunities and challenges in the world economies, in the family enterprise field, and in FFI itself. Your commitment, participation, and commentary ensure that, as an organization, we are on the move. We are proud of the numerous ways in which we pivoted in 2020 and are pleased that the membership has stayed loyal, involved, and committed to bringing their considerable expertise to FFI. Now...Happy New year and on to 2021!



With appreciation,

A handwritten signature in black ink that reads "Debbie". The signature is fluid and cursive, with a long horizontal stroke at the end.

Debbie Bing

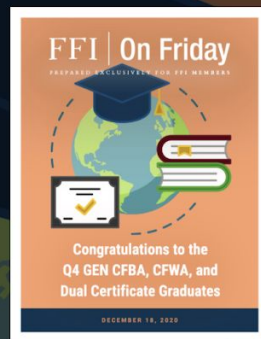
FFI Chair

2021 FFI GLOBAL CONFERENCE

All submissions must be made online. Late submissions will not be accepted. Proposals can be made for virtual or in-person conference or both. The deadline for submissions is January 24, 2021!

[VIEW DETAILS](#)

PREVIOUS EDITION



This week, we recognize the Q4 2020 GEN graduates receiving Certificates in Family Business Advising (CFBA), Certificates in Family Wealth Advising (CFWA), and Dual Certificates (CFBA/CFWA).

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.

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