



PREPARED EXCLUSIVELY FOR FFI MEMBERS

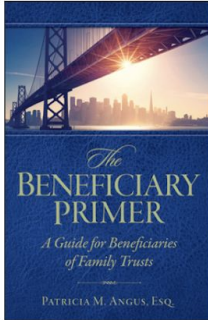
# New books from FFI members

MARCH 05, 2021



**T**oday, we are pleased to feature recent and upcoming book releases from FFI members. Please help us continue this periodic feature by letting us know about books we might have missed. They don't have to be in English!

## ***The Beneficiary Primer: A Guide for Beneficiaries of Family Trusts (December 2020) by Patricia Angus***



*The Beneficiary Primer* is a guide and workbook that addresses the responsibilities and varied concerns that encompass the role of a trust beneficiary. Key concepts are distilled to their essential elements, and the encouraging tone is easy to read while maintaining a sense of the importance of the beneficiary's role.

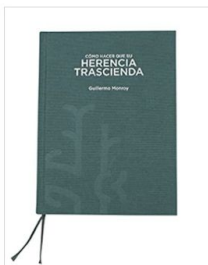
**Patricia Angus, JD, MIA, TEP**, is CEO of Angus Advisory Group LLC and an adjunct professor at Columbia University Graduate School of Business, where she is founding Managing Director of the Family Business Program. She has advised families with businesses, trusts, and charitable foundations for more than two decades, building bridges across disciplines through her teaching, education, and thought leadership. Patricia is an FFI Fellow, a former GEN faculty member, and the recipient of the 2019 Interdisciplinary Award.



**Patricia Angus**

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## ***Cómo hacer que su herencia trascienda (How to make your inheritance last) (Mosquito Culto, publisher) by Guillermo Monroy***



This book offers an innovative way to address issues of inheritance through the principles of empathy, harmony, responsibility, and protection. The author describes his method, called Plan Hereditario 360<sup>®</sup>, as a way to improve the chances of leaving a successful, long-lasting inheritance.

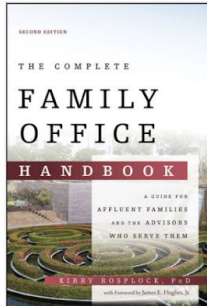
**Guillermo Monroy** specializes in advising Mexican and Latin American families to make their wealth extend across generations. He has experience designing equity and business structures, trusts, and family office services, as well as inheritances and agreements among heirs for the distribution of assets. He is also a researcher and theorist on ways of applying the theory of family systems to the needs of entrepreneurial families.



**Guillermo Monroy**

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## ***The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them, Second Edition (Wiley, November 2020) by Kirby Rosplock***



This book prepares the members of wealthy families to collectively manage, sustain, and grow their wealth across multiple generations. It also assists professionals who advise families to better serve their needs. *The Complete Family Office Handbook* provides current research, practical guidance, and approaches from leading family offices from around the globe and illustrates, by way of case studies and examples, how families can effectively manage their wealth for the long term.

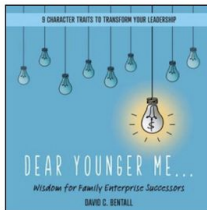
**Kirby Rosplock, PhD** is Founder and CEO of Tamarind Partners. She is a fourth-generation owner and board member of her family's lumber business. She was formerly Director of Research & Development at GenSpring Family Offices. Kirby is an FFI Fellow, a GEN faculty member, and 2018 recipient of the Richard Beckhard Practice Award.



**Kirby Rosplock**

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## **Dear Younger Me by David C. Bentall (Castle Quay Books, November 2020)**



In his latest release, David C. Bentall explores nine key character traits that are critical for all family enterprise successors. Drawing on his own experience, he provides a roadmap for cultivating emotional intelligence and for improving family relationships.

FFI Fellow **David C. Bentall** is founder of Next Step Advisors, a pre-eminent professional advising firm for business-owned families. His expertise is rooted in understanding of family dynamics which he gained by spending more than three decades as part of Dominion Construction, one of Canada's most prominent real estate and construction companies. David will be presenting at the 2021 conference in London in October.

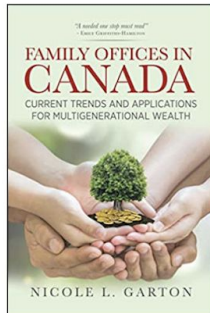


**David C. Bentall**

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## ***Family Offices in Canada: Current Trends and Applications for Multigenerational Wealth* (Tellwell Talent, publisher) by Nicole Garton**



More and more Canadians of wealth are realizing the importance of treating their family assets, their family identity, and their family brand as dimensions of the family's business. This book discusses the concept, the theory, and the practice of the family office as an instrument to enable legacy families to create a positive impact on the world.

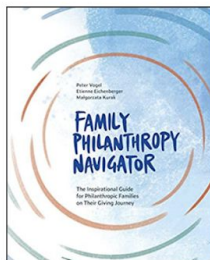
**Nicole Garton, B.A., LL.B, LL.M., C.Med, FEA, TEP** is a lawyer, mediator and parenting coordinator of family law, wills and estates matters. She is president of Heritage Trust in West Vancouver, British Columbia.



**Nicole Garton**

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## ***Family Philanthropy Navigator* (IMD International, December 2020), by Peter Vogel, Etienne Eichenberger, and Malgorzata Kurak**



Philanthropy is changing and transforming, and philanthropic families are seeking out new ways to ensure that their giving is meaningful and effective. The *Family Philanthropy Navigator* is a step-by-step guide for new and existing philanthropic families to answer core questions about their motivations and goals for giving.

**Peter Vogel** is Professor of Family Business and Entrepreneurship and holder of the Debiopharm Chair for Family Philanthropy at IMD Business School in Lausanne. He is also the Director of IMD Global Family Business Center.



**Peter Vogel**

**Etienne Eichenberger** is cofounder and managing partner of WISE Philanthropy Advisors. He is a former GEN faculty member and will present at the FFI global conference in October with Peter Vogel.



Etienne  
Eichenberger

**Malgorzata Kurak** is a Postdoctoral Research Fellow at the Debiopharm Chair for Family Philanthropy at IMD Global Family Business Center.



Malgorzata Kurak

## Harvard Business Review Family Business Handbook (Harvard Business Review, January 2021) by by Josh Baron and Rob Lachenauer



*Harvard Business Review Family Business Handbook* is a resource for guidance and practical advice, drawing on the authors' experience working closely with a wide range of family businesses of all sizes around the world. The authors present approaches for communicating effectively, managing conflict, building the right governance structures, and more.

**Dr. Josh Baron** is a co-founder and Partner at BanyanGlobal. For the last decade, he has worked closely with families around the world who own assets together, such as operating companies, family foundations, and family offices. He is an adjunct professor at Columbia Business School and presented at the 2020 FFI global conference and will be presenting at the 2021 conference in London in October.



Josh Baron

**Rob Lachenauer** is a cofounder and the CEO of BanyanGlobal. Throughout his career, he has been both a consultant and entrepreneur. He has experience with industrial, distribution, consumer goods, financial, technology, and automotive firms, and he has consulted for clients around the world. He presented at the 2020 FFI global conference.



**Rob Lachenauer**

## ***Pioneering Family Firms' Sustainable Development Strategies*** (Edward Elgar Publishing, March 2021), edited by **Pramodita Sharma and Sanjay Sharma**



This book describes the sustainable development journey of 15 business families, varying in size, age, industry, and location, that are committed to using their enterprises as a force of societal good. In turn, each family reaps benefits of high economic returns, while contributing to society and environment.

**Pramodita Sharma**, FFI Fellow, is a professor and Daniel Clark Sanders Chair in Entrepreneurship & Family Business at the Grossman School of Business, University of Vermont. She is a former FFI board member and recipient of the Barbara Hollander Award, and from 2008-2017 she served as the editor of the *Family Business Review*. In 2013 she launched the Global Family Enterprise Case Competition.



**Pramodita  
Sharma**

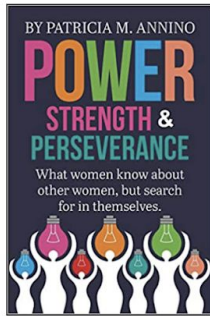
**Sanjay Sharma** is Dean and Professor of Management at the Grossman School of business at the University of Vermont. He and Pramodita Sharma will be presenting in the October 18 FFI virtual conference.



**Sanjay Sharma**



## **Power, Strength & Perseverance by Patricia Annino**



*Power Strength & Perseverance* is both a manual on the forms of direct and indirect power that women can use in the workforce and a history of America's feminist movements and the power that women have held throughout history and into the present. The book argues for the use of "soft power," to lead through persuasion rather than through aggression or coercion.

Patricia M. Annino is an attorney with Rimôn, P.C. in Boston. An FFI Fellow, former member of the FFI board of directors, founding member of the 2086 Society, and frequent contributor to FFI Practitioner, she has been voted by her peers as one of the Best Lawyers in America, Estate Planner of the Year and EuroMoney's "Best in Wealth Management – USA."



Patricia M.  
Annino

**PLEASE READ ON FOR PREVIOUS EDITIONS FEATURING BOOKS  
BY FFI MEMBERS**

**New Books from FFI Members, February, 14, 2020 Edition**

**More Books by FFI Members, May, 01, 2020 Edition**

## PREVIOUS EDITION



Today, 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.

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## DATES TO REMEMBER

**MAR  
10**

**Midwest Chapter Event**

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**MAR  
31**

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

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**APR  
01**

**Registration of Q2 GEN courses opens**

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**APR  
12 –  
13**

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

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**APR  
15**

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

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**Last day to apply for GEN scholarships**

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**APR  
19 –  
20**

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

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