



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the FFI Organizational Members – Part III

MARCH 19, 2021



Today, in our third issue of this year's series on FFI organizational members, we are pleased to feature the following distinguished association and professional organizations.

ATTORNEYS FOR FAMILY-HELD ENTERPRISE (AFHE)



The mission of **AFHE** is to be the leading resource for the on-going advancement, collaboration and education of practicing attorneys and other professionals who provide multi-disciplinary counsel to family-held enterprises. All current members of AFHE are FFI members. AFHE officers are Michael Whitty, Laura Wartner, Emmanuel Fournaris, and David W. Burleigh.

AFHE members presenting at the FFI conference in October are Linda Mack, Keith Michaelson, Donald Opatrny, and Natasha Pearl. Blair Trippe is on the 2021 Conference Program committee.



Linda Mack
FFI Fellow



Keith Michaelson



Donald Opatrny



Natasha Pearl



Blair Trippe
FFI Fellow



Michael Whitty
FFI Fellow

BANK OF AMERICA PRIVATE BANK



Bank of America Private Bank has been recognized as Best Private Bank in North America for Customer Service and Best Private Bank for Philanthropy Services (globally) by *Professional Wealth Management (PWM)*. As a private bank, Bank of America offers personalized strategies to help families manage the complexities of wealth. Its range of services include broad-based investment management, managing customized trusts, and administering complex estates. FFI members are Carrie R. Seligman, FFI Fellow and chair of the FFI New England Chapter; Holly Harben Swan; and Howard M. Weiss.



Carrie R. Seligman
FFI Fellow



Holly Harben Swan



Howard M. Weiss

COUTTS & CO.



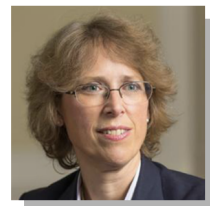
Coutts & Co. has a 300-year history of working with families in business, focusing on the contribution these companies make to global economies and societies. The Coutts Institute provides business families with advice and expertise on themes such as family governance, ownership succession, and leadership development. FFI members are Rachel Harrington, CFBA/CFWA; Stuart May, CFBA/CFWA; and Irene Wolstenholme, CFWA.



Rachel Harrington



Stuart May



Irene Wolstenholme

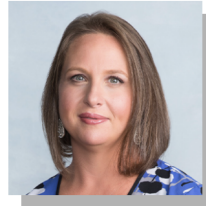
PITCAIRN

The logo for Pitcairn, featuring the word "PITCAIRN" in a blue, serif font with a thin blue underline.

Pitcairn is a leading multi-family office, dedicated to helping families sustain and grow their substantial, often complex financial assets and support their unique heritage across multiple generations. Using their comprehensive Wealth Momentum® family office model, Pitcairn provides every service wealthy families and family offices need across both financial and family dimensions. FFI members include Andy Busser, President of Family Office division; Karen Carlson, ACFWA; Amy Hart Clyne, CFBA, Chief Knowledge & Learning Officer, who will be presenting at the FFI conference in October; Andrew Pitcairn; and Leslie Voth, Chairman, CEO & President.



Andy Busser



Karen Carlson



Amy Hart Clyne



Andrew Pitcairn



Leslie Voth

THE FAMILY BUSINESS CONSULTING GROUP, INC.



The Family Business Consulting Group has earned a reputation as a valuable resource in the family business community helping both the family and the business. The Family Business Consulting Group consults with family businesses around the world to explore solutions to family and business issues, decide on the best course of action, and implement plans that will help the family business succeed for generations. More than 20 members of FBCG are members of FFI, of which six are FFI Fellows.



Craig Aronoff

FFI Fellow

Richard Beckhard
Practice Award Recipient



Barbara Dart

FFI Fellow



David M. Karofsky

FFI Fellow



Jean Meeks-Koch

FFI Fellow



Drew Mendoza

FFI Fellow

Richard Beckhard Practice Award
Recipient



Lisa Morel

FFI Board Member



John Ward

FFI Fellow

Richard Beckhard Practice Award
Recipient

FFI ORGANIZATIONAL MEMBERS

[VIEW A COMPLETE LISTING OF FFI ORGANIZATIONAL MEMBERS](#)

[VIEW MEMBERSHIP DETAILS](#)

FFI is the leading association worldwide and the organization of choice for advisors, consultants, educators, researchers, and family enterprise members who help perpetuate trans-generational family business wealth.

Please read on for previous editions featuring our organizational members.



[READ EDITION](#)



[READ EDITION](#)

PREVIOUS EDITION



The 2021 Nominating Committee welcomes suggestions from the FFI membership for possible nominees for consideration for Board of Director positions for four-year terms that begin following the Annual Meeting in October 2021.

[READ MORE](#)

DATES TO REMEMBER

MAR
28

Last day to suggest nominees for 2021 Board of Directors

[SUBMIT A NOMINATION](#)

MAR
31

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

[LEARN MORE AND ENROLL](#)

APR
01

Registration opens for Q2 GEN courses

[LEARN MORE AND REGISTER](#)

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](#)