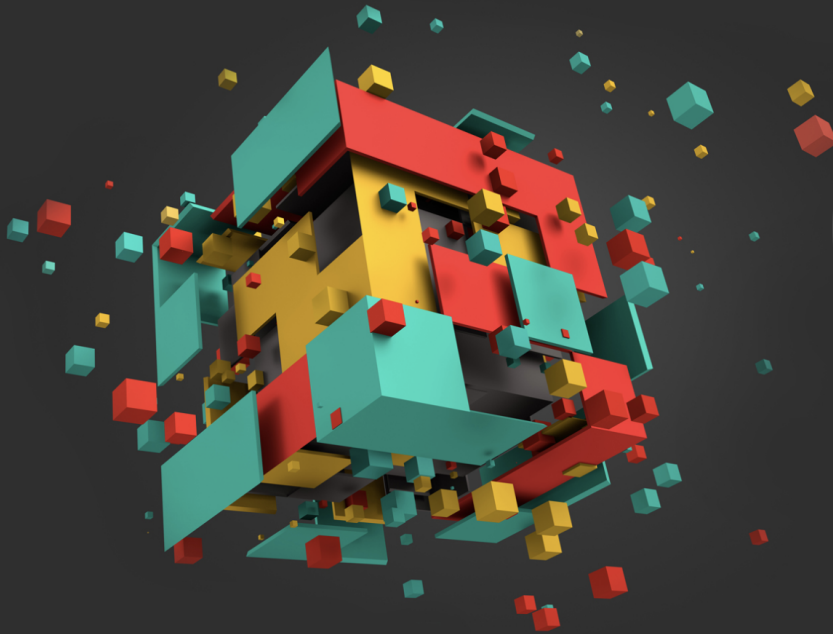




**CAMBRIDGE JUDGE BUSINESS
SCHOOL, ACADEMIC HOST**

PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the London Conference

NOVEMBER 12, 2021



In light of the travel mandates that kept a number of FFI members from traveling to London this year, today we are bringing some of the presenters to you. Read on to learn more about the London conference presenters and their work.



Advising the Wealthy Client: A Handbook for Working with the Ultra Wealthy

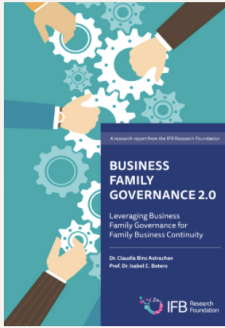
Barbara Hauser, editor

This handbook, featuring contributions by leading private client advisors, includes chapters on a range of essential topics, including the importance of having a detailed and organized balance sheet, managing cross-border taxes, protecting assets, understanding trust documents, and setting up a family office. The book also explores risk and reputation management, addresses diminished capacity, and discusses the essential requirements of wealth infrastructure, the philanthropic framework, and the future of global investing.



Barbara Hauser

Barbara Hauser is a leader in global family governance. Her publications include *International Family Governance*, *Trusts in Prime Jurisdictions*, the STEP handbook *Family Offices*, *Life Cycles of a Family Business*, *Advising the Wealthy Client*, *Mommy Are We Rich?*, *The Next Generation and the Pursuit of Happiness*, and *Setting up a Family Office*. She presented “Rule of Law Benefits in Family Governance” at the global conference in London.

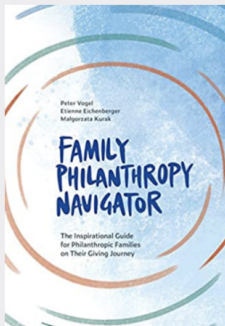


Business Family Governance 2.0

IFB Research Foundation

The latest report from the IFB Research Foundation, *Business Family Governance 2.0*, suggests that family governance plays a key role in achieving a multigenerational legacy in family firms. The report takes an in-depth look at family governance practices in business-owning families throughout the world. The project included a review of prior research on family governance, an international survey of representatives of business families, and case studies of multigenerational business families to identify best practice.

The Institute for Family Business-UK (IFB-UK) was a collaborator in presenting the pre-conference session, “Discussion with Family Business Leaders: How to better working experience/relations between family business owner-managers and their advisors.”



Family Philanthropy Navigator

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. *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.



Etienne
Eichenberger

Etienne Eichenberger is cofounder and managing partner of WISE Philanthropy Advisors. He is a former GEN faculty member and co-presented “Navigating with Success in Your Family Philanthropy” at the FFI global conference in London.



Finding Her Voice and Creating a Legacy: Portraits of Pioneering Women Leading Wealthy Families

Amy Hart Clyne and Dennis Jaffe

Across the globe, women are assuming positions of power, influence, and wealth in record numbers, while across society, women are embracing a new role in which staid stereotypes and traditional roles no longer apply. Yet, in the exclusive enclave of ultra-high net worth families, the roles of women remain hindered by longstanding conventions and complex intergenerational dynamics, and their stories are often told through the voices of others. *Finding Her Voice & Creating a Legacy* shares personal and profound stories from these women, uncovers what made them unique, and offers key themes and actionable insights to serve today's pioneers and the next generation of women leading family enterprises.



Amy Hart Clyne

Amy Hart Clyne is Chief Knowledge and Learning Officer at Pitcairn, a leading family office serving over 125 ultra-wealthy families. She brings more than 25 years of experience to the private wealth space. She holds an MBA from Columbia Business School, Columbia University, a BA from Colgate University, a CFP and CFBA.



Dennis Jaffe

Dennis Jaffe is the author of *Borrowed from Your Grandchildren: The Evolution of 100-Year Family Enterprises* and advisor to global families. He has a BA degree in Philosophy, MA in Management, and Ph.D. in sociology, all from Yale University, and is professor emeritus of organizational systems and psychology at Saybrook University in San Francisco. An FFI Fellow and GEN Faculty member, Dennis Jaffe is the recipient of FFI's 2017 International Award and 2005 Richard Beckhard Practice Award.

Amy Hart Clyne and Dennis Jaffe presented "The Often-Invisible Role of Women as Family Enterprise Culture Change Leaders: Study highlights" at the 2021 conference in London.



A Road to Triumph in Family Business: A Guide to Improving Communication, Defining Business Purpose and Drafting the Family Charter

Guillermo Salazar

Triunfa con tu empresa familiar: Guía para mejorar la comunicación, definir el propósito y redactar el Protocolo Familiar

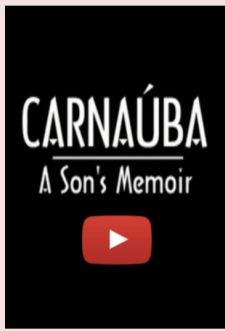
A Road to Triumph in Family Business is a guide for family business leaders and those who aspire to become one. The book provides theoretical and practical strategies to manage family enterprises, from founding to governance to generational transition. Real examples and analysis provide guidance on topics including communication with the business family; defining the business purpose; creating an effective family charter; and identifying and managing generational transition.



Guillermo Salazar

Guillermo Salazar is an expert on corporate governance and succession strategic planning. He is the founder and director of Exaudi Family Business Consulting, and he has served as advisor for numerous business families on their protocols, generational transition, alignment of family vision and values for decision-making, and conflict resolution. He is an FFI Fellow, former member of the Board of Directors, and recipient of the FFI International Award. He is a mentor and founding member of FFI's Iberoamérica Virtual Study Group. At the 2021 conference in London, Guillermo co-presented the session "The Hero Journey: An Ancient Narrative Model for a New Practice."

Opening Keynote



Carnauba: A Son's Memoir

SC Johnson

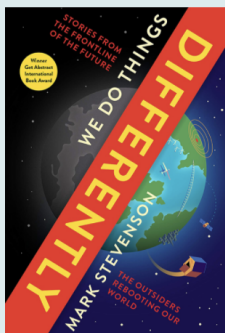
In 1998, fourth generation SC Johnson leader Sam Johnson recreated his father's 1935 expedition from Racine, Wisconsin, to Fortaleza, Brazil. He expected a great adventure....but it became even more: a deeply personal story about parents and children, love and support.



Fisk Johnson

Fisk Johnson, Chairman and CEO of SC Johnson, presented the London conference's opening keynote, "When Doing Good and Profitability Collide: Choosing Substance Over Shadow." Fisk Johnson holds a Bachelor of Arts in Chemistry and Physics; a Master of Engineering; a Master of Science in Physics; a Master of Business Administration; and a doctorate in Physics, all from Cornell University. Fisk and SC Johnson have received numerous awards for environmental and social leadership, including the Presidential Green Chemistry Award, the Environmental Protection Agency's Lifetime Atmospheric Achievement Award, and the International Leadership Award from the U.S. Council for International Business.

2022 FutureNaut in Residence, provided by the FFI 2086 Society



We Do Things Differently

Old models—for education, healthcare, government, food production and energy supply —are creaking under the weight of modern challenges. As the world's population heads towards 10 billion, it is clear we need new approaches. In this book, Mark Stevenson sets out to find them, uncovering a picture of what can be done to address the world's most pressing dilemmas. It is a window on (and a roadmap to) a different and better future.



An Optimist's Tour of the Future

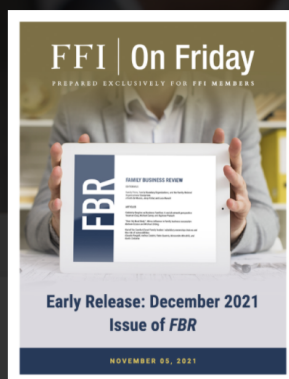
Internationally best-selling *An Optimist's Tour of the Future* charts Stevenson's exploration of what the future might hold for humanity. A meticulous researcher, Stevenson sifts the genuine concerns about new technologies from fear-mongering. Insightful and often very funny, *An Optimist's Tour of the Future* is a portrait of where we'll be when we grow up—and why it doesn't have to be scary.



Mark Stevenson

Mark Stevenson is one of the world's most respected thinkers on technology and societal trends—helping you see where the world is going and how to adapt. As founder of the cultural change agency We Do Things Differently, he is helping organizations across the globe see their role in creating a better future. His many advisory roles include Sir Richard Branson's Virgin Earth Challenge, Civilized Bank, Atlas of the Future, and The Institution of Mechanical Engineers.

PREVIOUS EDITION



FAMILY BUSINESS REVIEW

We are pleased to provide you with an advance look at the December 2021 issue of *Family Business Review (FBR)*.

of the Family-Related

Alfredo De Massis, Josip Kotlar, and Luca Manelli

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DATES TO REMEMBER

NOV
17

Midwest Chapter virtual meeting featuring James Weiner: “The Quest for Legitimacy”

12 PM – 1:30 PM Central

[REGISTER](#)

DEC
1

STEP Business Families Special Interest Group Spotlight Session
Sustainable and Successful Family Enterprises: A practitioner’s road map for the next generation’s priorities

[LEARN MORE AND REGISTER](#)