



**2021
ORGANIZATIONAL
MEMBERS**

**2022 FFI
GLOBAL
CONFERENCE**

**THINGS TO
REMEMBER IN
DECEMBER**

PREPARED EXCLUSIVELY FOR FFI MEMBERS

2021 Organizational Members, the 2022 Global Conference, and December Reminders

NOVEMBER 26, 2021



As we speed toward December, we would like to help conclude the year with recognition of our 2021 organizational members, look toward the next year with 2022 Global Conference announcements, and maintain focus on the present with reminders for the last month of the year.

THANK YOU TO ALL 2021 ORGANIZATIONAL MEMBERS!

FFI Organizational Members include associations, educational institutions, and professional organizations that are members of FFI. More than 50 organizational members, including 34 professional organizations, 3 associations, and 14 educational organizations, increase the global footprint of the field. View a complete listing [here](#). To learn more about organizational membership, go [here](#) or email ffi@ffi.org.

Associations and Professional Organizations receive complimentary listings in the FFI [Consultants & Speakers Directory](#) and Educational Organizations receive listings in the [Educational Centers Directory](#).

We are so pleased to feature the following distinguished educational and professional organizations to close out the year.

CLAIRMONT TRUST



Clairmont Trust, based in the Bahamas, is committed to providing comprehensive wealth structuring services and investment advice for each client. It offers wealth structuring and family advisory services, corporate and family governance, expert fiduciary services, and family office services.

Clairmont's FFI members are FFI Fellow Miles Evans; James Hoar; John Jephson; and FFI Fellow and former board member James Stewart.



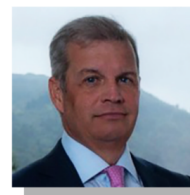
Miles Evans
FFI Fellow



James Hoar



John Jephson



James Stewart
FFI Fellow



FIDELIUS FAMILY OFFICE



Fidelius Family Office is a family-office organization for enterprising families throughout the Americas. Fidelius addresses the multiple, interlocking concerns of business families—including family dynamics, governance of both the family and the enterprise, long-term investment strategies, and the family's emotional, physical, and financial health. Based on years of experience and working with hundreds of business families, Fidelius has developed a methodology that allows for analysis of the needs of each family, regardless of its complexity.

FFI members are Luisa Cardona, Alicia Gerrits, Lisseth Herrera, Ernesto Lewin, and FFI Fellow and former FFI board member Rodolfo J. Paiz.



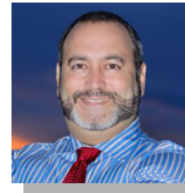
Luisa Cardona



Lisseth Herrera



Ernesto Lewin



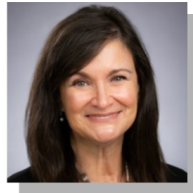
Rodolfo J. Paiz
FFI Fellow

UNIVERSITY OF DENVER



The Bailey Program for Family Enterprise (BPFE) at University of Denver is a global-reaching and Rocky Mountain-based initiative collaboratively building student, alumni, family, leadership, and professional communities of learning through courses, mentoring, webinars, workshops, and symposiums. Designed by practitioners, professors, and people experiencing the impact of complex family enterprise decision making, BPFE is a partner resource for family enterprise education, delivering interdisciplinary family office and family business programs on its campus, as well as virtually and in a hybrid model to meet the diverse learning needs of its participants everywhere.

FFI members are Conrad Ciccotello; Michelle Clements; Charles Dhanaraj, Beth Flamures; Sharon Lassar; FFI Fellow, 2014 recipient of the Barbara Hollander Award, co-founding editor of *FFI Practitioner*, and former GEN faculty member Kim Schneider Malek; Joshua Ross; Richa Singh; and Shelly Smith-Acuna.



Kim Schneider Malek

FFI Fellow

Read Kim Schnieder Malek's most recent *FFI Practitioner* article [here](#).

THE 2022 GLOBAL CONFERENCE

FFI | Family Firm Institute
Educate | Connect | Inspire

2022

DECEMBER 1

Year-end reduced rates for the 2022 global conference in Boston/Cambridge will become available.

DECEMBER 3

Call for Education Sessions for the 2022 global conference will open. The 2022 theme will be "Family Enterprise and the Fourth Economy: Internal and External Pressure to Change and Adapt."

THINGS TO REMEMBER IN DECEMBER

DECEMBER 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](#)

BEFORE DECEMBER 31

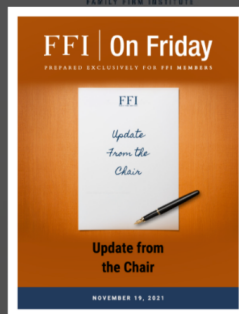
[Renew your FFI membership](#)

Consider supporting a GEN student with a 2022 scholarship.

[Email for more details](#)

Check out *FFI Practitioner* articles, podcasts, and précis that you may have missed in 2021. Find them all at ffipractitioner.org. Want to write for *FFI Practitioner*? Learn more [here](#)!

PREVIOUS EDITION



Dear Colleagues,

We're still fresh off a successful FFI conference week, including a dynamic virtual conference on October 18 and 19, and a generative in-person meeting in London and Cambridge from October 20 to 23.

Meanwhile, I'm pleased to provide you with a brief report from the November 9 FFI Annual Meeting. It was our second virtual annual meeting, and we're learning that this format enables more people to join from more locations.

Here are some topics we covered.

[READ MORE](#)