



PREPARED EXCLUSIVELY FOR FFI MEMBERS

An Invitation to Continue Your Professional Education

AUGUST 19, 2022



Don't miss these two opportunities to continue your professional education through FFI's online educational programs this fall!

Philanthropy, Investing and the Enterprise: Advising families in pursuit of impact

Tuesday, September 20 AND Wednesday, September 21 (8AM-12PM ET)
Two half-day virtual seminars

Concepts include:

- Understanding how today's wealthy individuals, families, and their family offices express values and work towards social and environmental impacts through philanthropic giving, operating businesses, and investments (including impact investing).
- Identifying practical approaches, both relevant and rigorous, to position philanthropy at the heart of conversations on values, succession planning, and preparing the next generation.
- Presenting practical approaches to help your clients shape their philanthropy as a family and develop tools to engage the rising generation.
- Understanding how leading business families incorporate environmental, social, and governance goals in their operating businesses.
- Understanding the spectrum of sustainable investment opportunities and how clients can get started—from impact and thematic investing to responsible investment in the public and private markets.

Faculty

James Coutre
ACFBA/ACFWA



James Coutre is vice president of Insights and Connections at Fidelity Family Office Services in Boston. Prior to joining Fidelity, he was a partner at The Philanthropic Initiative (TPI).

Maya Prabhu
FFI Fellow



Maya Prabhu is Managing Director and Head of Wealth Advisory for J.P. Morgan Private Bank. She is a member of the FFI board of directors and the 2086 Society.

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Tools for Positive Change in Family Enterprise Systems: Analysis and application

Tuesday, October 11 AND Wednesday, October 12 (8AM-12PM ET)
Two half-day virtual seminars

Concepts include:

- An overview of family enterprise tools, frameworks, and techniques for analyzing family enterprise cases, achieving positive change, and ultimately, dealing with the complex issues that consultants face when assisting family enterprises.
- The seminar will present a sample of tools that serve different purposes, such as a) analyzing the needs and challenges facing the family enterprise system; b) the development of key governance elements, including a values and mission statement, family communication policy, and family member employment policy; and c) helping to facilitate different interventions, including the eruption of conflict.
- Through the seminar, students will gain insight into the skills required for family enterprise professionals to adequately apply and eventually achieve positive change for their clients.
- A unique feature of this seminar is the "hands on" approach, devoting an important part of the course to group dynamics, shared analysis, and role-playing exercises in a safe learning environment.
- One of the main goals is learning how a careful application of appropriate tools assists in the development of valuable collaborative progress among family enterprise participants.

What to expect from the seminar:

The seminar is a combination of theory and practice, weighted towards the practical. Interwoven with the introduction of concepts and tools by the faculty are practical exercises in working groups or break-out rooms, report-outs to the full assembly with invited questions and commentary, all leading to relevant individual and group learning.

Faculty

Andrew Hier
FFI Fellow



Andrew Hier is a senior partner with Cambridge Advisors to Family Enterprise, where he assists clients with ownership, business and family issues, including development of the next generation and conflict management.

Neus Feliu
FFI Fellow



Dr. Neus Feliu is a consultant, researcher, and educator in the area of family enterprises. She is a partner at Lansberg Gersick Advisors (LGA), a global professional advisory firm supporting the world's leading family enterprises on all aspects of governance and continuity, often as they face complex generational transitions.

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THE 2022 GLOBAL CONFERENCE IS OCTOBER 26 – 29!

SUMMER RATES END AUGUST 31.

[LEARN MORE AND REGISTER](#)

PREVIOUS EDITION



We are pleased to provide you with an advance look at the September 2022 issue of *Family Business Review (FBR)*.

As an FFI member, you have access to the complete library of *FBR* articles at no charge.

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DATES TO REMEMBER

AUG
31

Summer rate for 2022 conference ends

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SEP
20 & 21

Philanthropy, Investing and the Enterprise: Advising families in pursuit of impact

Two half-day virtual seminars

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OCT
11 & 12

Tools for Positive Change in Family Enterprise Systems

Two half-day virtual seminars

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