



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the 2022 FFI Organizational Members: Part II

FEBRUARY 18, 2022



We are pleased to feature the following distinguished organizations that are FFI organizational members.

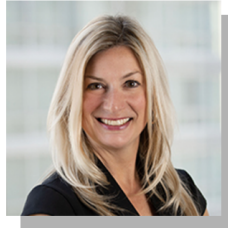
ALLIANT PRIVATE CLIENT



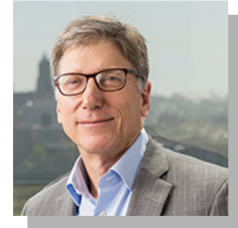
Alliant Private Client, a division of Alliant Insurance Services, manages the insurance needs for affluent individuals and families who require a sophisticated approach to personal risk management. Alliant's Family Enterprise Risk Practice provides a suite of specialty insurance services that address the complex risks of business owning families and family offices. FFI members from Alliant Private Client include FFI Fellow Linda Bourn, Courtney Eber, Paul Funk, Steven Kent, and Lori Quinn.



Linda Bourn
FFI Fellow
Former board member



Courtney Eber



Paul Funk



Steven Kent



Lori Quinn

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.

Among their FFI members are FFI Fellows Warner K. Babcock, Bonnie B. Hartley, Michael Hartley, Linda Mack, Paul Milne, Dennis Passis, Jeff Savlov, Blair Trippe, and Michael Whitty. Other AFHE members were presenters in the FFI 2021 global virtual conference.



Warner K. Babcock
FFI Fellow



Bonnie B. Hartley
FFI Fellow



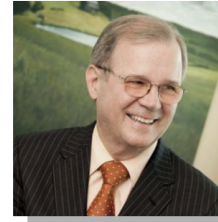
Michael Hartley
FFI Fellow



Linda Mack
FFI Fellow
2021 Global Conference presenter



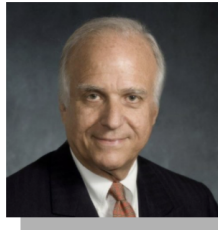
Keith Michaelson
2021 Global Conference presenter



Paul Milne
FFI Fellow



Donald Opatry
2021 Global Conference presenter



Dennis Passis
FFI Fellow



Natasha Pearl
2021 Virtual Conference presenter



Jeff Savlov
FFI Fellow



Blair Trippe
FFI Fellow
2021 Conference Committee



Michael Whitty
FFI Fellow

BANYANGLOBAL FAMILY BUSINESS ADVISORS



BanyanGlobal advises the owners of the world's leading family enterprises as they make difficult decisions during transitions. When set up thoughtfully, a family's involvement with these enterprises is often the key to their longevity.

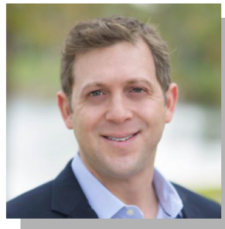
FFI members are Vladimir Barbieri, Josh Baron, Nick Di Loreto, Ben Francois, Marion McCollom Hampton, Rob Lachenauer, Aline Porto, and Judy Lin Walsh.

Read Nick Di Loreto and Judy Lin Walsh's July 2021 *FFI Practitioner* article, "The Entrepreneurship Gene: How to help your clients cultivate theirs," a case study about Edouard Thijssen, co-founder of Trusted Family.

[Read More](#)



Vladimir Barbieri



Josh Baron

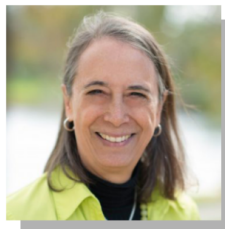


Nick Di Loreto

2021 Global Conference presenter



Ben Francois

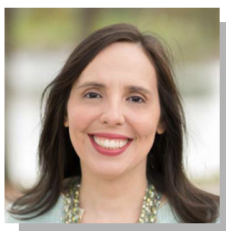


Marion McCollom Hampton

FFI Fellow
Former FFI Board member
Richard Beckhard Practice Award
recipient



Rob Lachenauer



Aline Porto



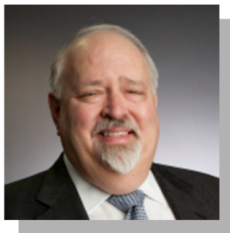
Judy Lin Walsh

2021 Global Conference presenter

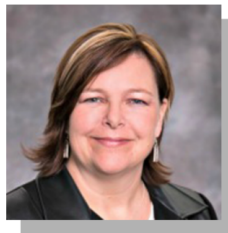
THE FAMILY BUSINESS CONSULTING GROUP, INC.



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. Its team of consultants has served over 2,800 client families in 70 countries to achieve one common goal: protect the integrity of the family and the enterprise for future generations. FBCG's work touches all aspects of the business and family system, identifying the areas where better processes, shareholder and family education, communication, and alignment will lead to better business performance and a stronger family. More than 20 members of FBCG are members of FFI, of which four are FFI Fellows. Drew Mendoza and John Ward, both retired members of FBCG, are FFI Fellows as well as recipients of the Richard Beckhard Practice Award. John Ward is a founding member of FFI.



Craig Aronoff
FFI Fellow
Richard Beckhard Practice Award
Recipient



Barbara Dartt
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
Achievement Awards Committee



John Ward
FFI Fellow
Richard Beckhard Practice Award
Recipient

FAMILY OFFICE EXCHANGE



Family Office Exchange (FOX) is a peer-to-peer network for ultra-wealthy families and their family offices and advisers who utilize FOX's resources for advice, networking, education, and best practices in wealth management.

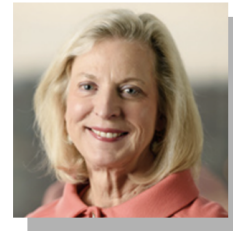
FFI members are Mindy Earley, Gabrielle Griffin, firm founder and CEO Sara Hamilton, Glen Johnson, Peter Moustakerski, Scott Muench, Mia Starr, and Scott A. Winget.



Mindy K. Earley
CFBA



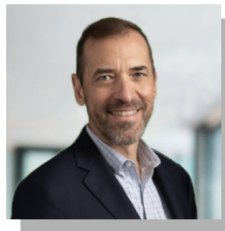
Gabrielle Griffin



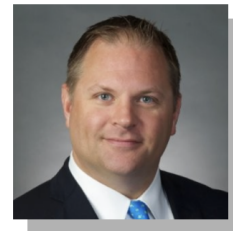
Sara Hamilton



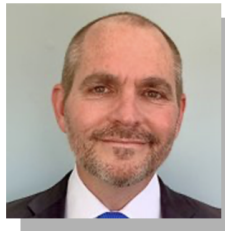
Glen Johnson



Peter Moustakerski



Scott Muench



Scott A. Winget

GRADDHA



Graddha is a wealth dynamics practice founded and led by husband-and-wife team Marlis and Kjartan Jansen. Bringing together more than forty years' of experience in human health, psychology, and finance, Graddha strives to promote human connection, empowerment, and creativity by understanding wealth in all its forms. Graddha serves individuals, couples, families, and family offices to support multigenerational cohesion and stewardship. Graddha services include preparation of heirs, family meeting facilitation, financial literacy training, advisor training and more.

FFI members are Kjartan Jansen, CFBA and Marlis Jansen.



Kjartan Jansen
CFBA



Marlis Jansen

TRUSTED FAMILY



Trusted Family, founded by two next gen members of business-owning families, has developed an online communications platform that enables families and family businesses to engage, interact, and collaborate more effectively. Trusted Family is a platform where clients organize documents, manage meetings, make decisions, and share information with family members, shareholders, and directors. The firm brings value to multigenerational family businesses and family offices globally by enhancing their board, shareholder, and family communication and collaboration activities via a secure digital, centralized, and permission-based platform.

FFI members are Katie Darnall, Arnaud de Coninck, Magali Houtart, Andrew Harker, Louis Lombard, Elvira Orza, Avelina Perez-Arteta, Edouard Thijssen, and Sofia Vollmer.

Trusted Family was a sponsor of the 2021 Global Conference in London.

Listen to Arnaud de Coninck's podcast with *FFI Practitioner*, "How Technology Can Enhance Your Work With Family Enterprise Clients".

[Listen Here](#)



Katie Darnal



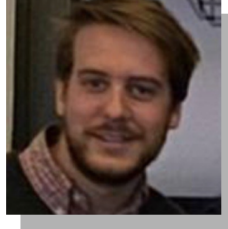
Arnaud de Coninck
2021 Global Conference presenter



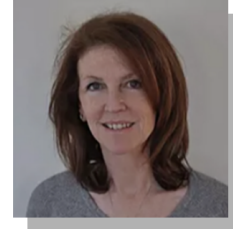
Magali Houtart



Andrew Harker



Louis Lombard



Elvira Orza



Avelina Perez-Arteta



Edouard Thijssen



Sofia Vollmer

FFI ORGANIZATIONAL MEMBERS

[VIEW COMPLETE LISTING](#)

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.

Take a look at our first 2022 issue to feature our organizational members.



[READ EDITION](#)

PREVIOUS EDITION



FFI is pleased to announce three virtual seminars available the first week of April. These virtual sessions will be held April 4, 5, and 6 from 8:00 AM to 12:00 PM Eastern. Space is limited to 25 participants per seminar.

As practitioners in the field, FFI members know how important it is to stay current and continue learning—through attending conferences, reading new publications, and expanding connections with other practitioners and researchers. And now, we have additional online educational opportunities in April! Choose one, two, or three seminars to continue your learning and to develop your expertise in the field.

[READ MORE](#)



DATES TO REMEMBER

MAR
1

Deadline for Best Doctoral Dissertation Award submissions

[VIEW DETAILS](#)

Last day to enroll in GEN Q1 courses

[LEARN MORE AND ENROLL](#)

MAR
3

Regional Reception at the Boston Marriott Cambridge in Kendall Square

[VIEW DETAILS AND REGISTER](#)

MAR
31

Last day to register for the FFI Global Conference with the Winter Rate

[VIEW DETAILS](#)

APR
4-6

Webinars for GEN graduates

[VIEW DETAILS](#)

APR
15

Deadline for Best Unpublished Research Paper Award

[VIEW DETAILS](#)

Deadline for Nominations for an Achievement Award

[VIEW DETAILS](#)

Deadline for GEN scholarships

[VIEW DETAILS](#)