



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Congratulations to the 2022 Achievement Award Recipients

JUNE 17, 2022



In 1992, to further enhance its multidisciplinary and global approach to family enterprise advising, consulting, and research, FFI began to establish awards for professional achievement. Today there are four: Richard Beckhard Practice Award, Barbara Hollander Award, Interdisciplinary Award, and International Award. These prestigious awards are the pinnacles of achievement in the field, and we are pleased to announce this year's recipients. The awards will be formally presented as part of the FFI annual global conference in October.

## **RICHARD BECKHARD PRACTICE AWARD**

### **Patricia Annino, FFI Fellow**

Patricia M. Annino is a partner with the Boston office of global law firm, Rimôn, P.C. She has been voted by her peers as one of the Best Lawyers in America (trust and estates), a Super Lawyer, a top 50 Massachusetts Female Lawyer, Boston Estate Planning Council's Estate Planner of the Year and the initial recipient of EuroMoney/Legal Media's "Best in Wealth Management- USA" award.

Patricia is a former member of the FFI Board of Directors and a founding member of the FFI 2086 Society. She is a frequent presenter at FFI conferences and contributor to the FFI Practitioner. She is the author of eight books and has been quoted extensively for national publications including *The Wall Street Journal*, *Chicago Tribune*, and Bloomberg. In addition to being an FFI Fellow, she is a Fellow of ACTEC (American College of Trust and Estates Council).

### **FROM THE NOMINATION**

Patricia fully exemplifies all that this award stands for. She has been an expert on estate planning and taxes for more than 30 years. Her work is exclusively with families, and she has helped shape the field through her active involvement in her industry and the broader based business community. Patricia actively cultivates new ideas and is disciplined and dedicated to sharing them with the field. She is a great supporter of FFI through thought leadership, financial support, work, and follow through, and as an ambassador and representative of FFI to the wider field.



**Patricia Annino**

The Richard Beckhard Practice Award was established in 1992 to honor a founding FFI member and distinguished practitioner in the family business field. It recognizes outstanding contributions to the field of family business practice.

[VIEW THE COMPLETE LIST OF RECIPIENTS OF THE RICHARD BECKHARD PRACTICE AWARD](#)

## **BARBARA HOLLANDER AWARD**

### **Daphne McGuffin, FFI Fellow**

Daphne is passionate about helping people learn; she has been designing, developing, and delivering learning solutions her entire career. Since 1999, she has designed and developed both experiential and self-directed learning programs for family businesses, and their trusted advisors, to promote governance and transition planning. Clients include a national bank, an international wealth management firm, many accounting firms, and prominent agricultural associations—all looking to help business families prepare for that inevitable transition.

As program director with BDO Canada, her role expanded to consultant and project manager for family enterprise succession through the development and delivery of customized strategic planning engagements for the owner family. Today, within D3 Learning Solutions, she continues to help family enterprises learn about and implement communication, governance, successor development, and transition planning strategies.

An FFI member since 2005, Daphne holds the ACFBA, is an FFI Fellow, and is a member of the GEN faculty.

## **FROM THE NOMINATION**

Like Barbara Hollander, Daphne is passionate about education and learning. She too has a profound interest in the field of family business and meets all the requirements for this award. Of particular significance is her support of FFI through participation in FFI's educational, membership, and organizational activities.

As a GEN faculty member, Daphne revised the CFBA and CFWA GEN course materials both conceptually and pragmatically. Her contribution has been amazing. The optimized versions, with enhanced learning objectives, better meet the needs of students and faculty members alike. This important contribution has helped the faculty with the delivery of the courses and maximized the learning for students.



**Daphne McGuffin**

The Barbara Hollander Award was created in 1995 to honor the late founder and first president of FFI by perpetuating her profound interest in family business and her love for education and learning.

[VIEW THE COMPLETE LIST OF RECIPIENTS OF THE BARBARA HOLLANDER AWARD](#)

## **INTERDISCIPLINARY AWARD**

### **Jack Wofford, FFI Fellow**

Jack Wofford is a mediator, facilitator, and arbitrator with his own national and international practice based in Cambridge, Massachusetts. For more than 30 years, he has provided impartial services, often in highly charged, multi-party contexts, in disputes covering a wide range of subject areas, with focus on family enterprise, small business, and the environment.

Previously, he was law clerk for a federal district judge, partner in a Boston law firm's real estate department, deputy general counsel of the US Department of Transportation, and presidential appointee to a panel that resolves impasses in federal labor negotiations. An FFI Fellow and former member of its board of directors, he has presented workshops and webinars on mediation, consensus building and conflict management, and initiated—and for many years facilitated—an annual FFI roundtable on LGBT issues. Jack graduated from Harvard College, Harvard Law School, and Oxford University (as a Rhodes Scholar).

## **FROM THE NOMINATION**

Building on principles of mediation, Jack has brought to FFI new and important perspectives on conflict that cut across and integrate our various disciplines—based on his commitment to impartiality toward all clients and trust in their ability, in a facilitated process, to create their own path forward. Jack has been a pioneer in the family enterprise field in helping families find that path. His warmth, trust, candor, and insight are qualities I have seen him blend with the mediation principles that guide him in his teaching, writing, and practice. He has contributed enormously to the field and to our organization. In my opinion, there is no one more deserving of this award.



**Jack Wofford**

## INTERNATIONAL AWARD

### Rodolfo Paiz, FFI Fellow

Rodolfo Paiz, FFI Fellow and former FFI board member, has been a trusted advisor to family systems in nearly every country across the Americas. He is the founder and CEO of Fidelius Family Office, itself a first-generation family business, created to guide business families in core issues from parenting to systemic governance, and to match families with other advisors as needed.

Rodolfo is in the third generation of his family of origin, a business family from Guatemala. He actively co-invests with his sisters and is the CEO of their single-family office, and has led Fundasistemas, a foundation focused on reducing poverty and economic development, since 2010. He found his spiritual home in FFI in 2007, and is a strong advocate for the strengths and advantages of family systems in international business. Most importantly, he is a husband and a father of two, living with his family just outside New York City.

## FROM THE NOMINATION

In almost a quarter of a century, Rodolfo has engaged directly with hundreds of families across 25 countries. A teacher at heart, he has advised family-enterprise associations across the Americas, and has always taken the time to speak to local and national government officials or non-profit groups on the particular nature of family systems and the benefits of healthy family enterprise for their local and regional economies. As a former member of the Board of Directors and the Editorial Committee for *FFI Practitioner*, as an FFI Fellow, and as the first donor to help launch FFI's signature GEN educational program, Rodolfo's dedication to service and his focus on education are visible within FFI as well.



**Rodolfo Paiz**



The International Award recognizes an individual or organization for outstanding achievement in furthering the understanding of family business issues which occur between two or more countries.

[VIEW COMPLETE LIST OF RECIPIENTS OF THE INTERNATIONAL AWARD](#)

## Thanks to the 2022 Achievement Awards Committee

Daniela Montemerlo, *chair*

Denise Federer

Alberto Gimeno

Lise Møller

Lisa Morel

Preston Root

**THE 2022 GLOBAL CONFERENCE IS OCTOBER 26 – 29!**

[LEARN MORE AND REGISTER](#)

## PREVIOUS EDITION



One of the hallmarks of FFI is its ongoing commitment to advance the field through publishing, practice, and research. Today, we celebrate outstanding contributions to the field by announcing the 2022 Academic Award recipients. These awards will be presented at the [FFI Conference in October](#).

[READ MORE](#)



## DATES TO REMEMBER

JUNE  
17

**Make a Hotel Reservation for the 2022 Conference**

[VIEW DETAILS](#)

JUNE  
30

**Spring Rate for 2022 conference ends**

[REGISTER HERE](#)

JULY  
14

**Webinar with FFI Futureonaut-in-Residence, Mark Stevenson**

Details and registration information to follow