



## 2022 FFI Global Conference

October 26-29, 2022 • Boston/Cambridge, MA

Family Enterprise and The  
Fourth Economy: Internal  
and External Pressures  
to Change and Adapt

## Featuring the Pre-Conference Sponsors

PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the Pre- Conference Sponsors

SEPTEMBER 16, 2022



**T**oday's issue is part of a monthlong series to highlight the sponsors of the FFI Global Conference in October. Today's issue features the sponsors and presenters of the pre-conference sessions on Wednesday, October 26.

## Ballentine Partners, LLC



**Ballentine Partners** is a client-centric investment and wealth management firm dedicated to integrity and independence. For over 35 years, their firm has delivered independent, objective, and comprehensive financial advice for wealthy families, and it continues to be a thought leader in the field. Today, with 105 employees serving 279 families, Ballentine's mission is to help families make smart decisions about their wealth, giving them the freedom to focus on the lives they want to lead.

Pre-Conference Session: To Pre-nup or Not to Pre-nup



**Presenter:**



Coventry Edwards-Pitt

Presenter Bio



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## FFI Iberoamérica Virtual Study Group



The **Iberoamérica Study Group**, which originated at the FFI conference in Brussels in 2012, is a Spanish-language online forum to educate, connect, and inspire members located in or interested in family enterprise issues in Latin America and Spain. Throughout its ten years, the Iberoamérica Study Group has extended FFI's core mission by focusing on education and multidisciplinary learning.

Pre-Conference Session: Consulting, Research, and Development in Spain and Latin America



**Presenters:**



**Guillermo Salazar**  
FFI Fellow



**Claudia Raunich**



**Ángel De Lorenzo Nieto**



**Salvador Cerón**  
ACFBA/ACFWA



**Elaine King**  
ACFBA

Presenter Bios



## Fidelity Family Office Services



**Fidelity Family Office Services** has a dedicated and exclusive focus on the ultra-wealthy community and a deep understanding of their sophisticated needs. Fidelity provides custody, brokerage, investment, and reporting services to single family offices, wealthy families, and the advisors who support them.

Pre-Conference Session: The Family Office of the Future



**Presenters:**



**James Coutre**  
GEN Faculty  
ACFBA/ACFWA



**William Parizeau**



**Jill Barber**

Presenter Bios



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## Sterling Resources, Ltd.



**Sterling Resources** is a boutique life insurance agency, focused on intergenerational wealth transfer and accumulation strategies for ultra-high net worth families and executives both in the U.S. and internationally. Sterling works collaboratively with advisory teams to create liquidity solutions by building, implementing, and servicing high quality, diversified life insurance portfolios. Their independent approach, commitment to service, and breadth of underwriting experience bring unique value to clients.

### Pre-Conference Session: Creating Successful Transition Plans for the Next Generation

This panel discussion, moderated by Sterling Resources, Ltd., will explore the role of life insurance and tax favored cash flow as well as the importance of life insurance portfolio management. Panelists will represent both “older” and “younger” generation points of view, in addition to professional family office executive perspectives.

#### Presenters:



**Karl Feitelberg**



**Jason Feitelberg**



**Tobi Silver**

#### Presenter Bios

## A SINCERE THANK YOU TO THE 2022 CONFERENCE SPONSORS

Alliance Bernstein	FFI Board of Directors
Angus Advisory Group LLC	FFI Iberoamérica Virtual Study Group
Patricia Annino	Generation6
Ballentine Partners, LLC	Green Associates, LLC
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Cambridge Family Enterprise Group	Sterling Resources, Ltd.
CFAR	Tharawat Magazine
Fiduciary Wealth Partners	Trusted Family
Fidelity Family Office Services	Twenty Second Consulting, LLC

### DON'T MISS THIS OPPORTUNITY TO CONTINUE YOUR PROFESSIONAL EDUCATION THROUGH FFI'S ONLINE EDUCATIONAL PROGRAMS THIS FALL!

**Tuesday, October 11 AND Wednesday, October 12 (8AM-12PM ET)**

Two half-day virtual seminars

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

[REGISTER](#)

**THE 2022 GLOBAL CONFERENCE IS OCTOBER 26 – 29!**  
**HOTEL RESERVATIONS ARE LIMITED! BOOK YOUR ROOM TODAY.**

[LEARN MORE AND REGISTER](#)

## PREVIOUS EDITION



Today's issue is the first of a monthlong series that will highlight the sponsors of the FFI Global Conference in October. We begin with the conference academic host, MIT Sloan School of Management.

[READ MORE](#)

## DATES TO REMEMBER

OCT  
**11 & 12**

Tools for Positive Change in Family Enterprise Systems  
Two half-day virtual seminars

[REGISTER](#)

OCT  
**26-29**

Annual Global Conference In-person in Cambridge, MA

[LEARN MORE AND REGISTER](#)

NOV  
**09**

FFI Annual Meeting (Virtual)