



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring FFI Authors

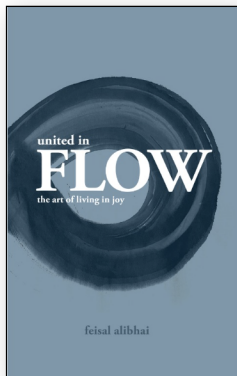
DECEMBER 15, 2023



F FI members continue to lead research and guidance in the field and beyond, and we are pleased to feature their recent publications. Please help us continue this periodic feature by letting us know about books and reports we might have missed!

Feisal Alibhai

United in Flow: The Art of Living in Joy by Feisal Alibhai



United in Flow acts as a guidebook for thriving amidst the universal challenges of everyday experience. By taking radical responsibility for the growth available in all relationships, readers can discover the art of living in joy.

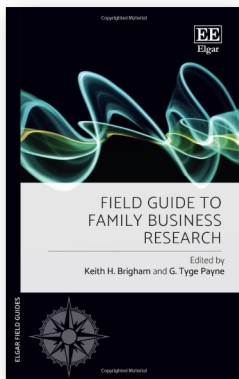


Feisal Alibhai

Feisal Alibhai is a third-generation family entrepreneur and the founder and CEO of Qineticare, the world's first family health office. Qineticare's mission is to empower individuals and families through an integrative wellbeing journey of self-discovery to transform their way of being and live a meaningful life. Feisal is also the author of *Four Steps to Flow: Living a Meaningful Life Head and Heart United*.

Keith H. Brigham and G. Tyge Payne

Field Guide to Family Business Research by co-editors Keith H. Brigham and G. Tyge Payne



The Field Guide to Family Business Research is a concise and accessible guidebook that addresses the unique challenges associated with conducting high-quality family business research. Intended for both new and more experienced scholars, experts provide essential guidelines and insightful 'best practices' for overcoming these challenges.

FFI members who contributed to chapters in the book include FFI Fellow Isabel C. Botero, FFI Fellow Cristina Cruz, Guido Corbetta, Joshua J. Daspit, Sara Davis, FFI Fellow Alfredo De Massis, FFI Fellow Nadine Kammerlander, Evelyn Micelotta, Paola Rovelli, FFI Fellow Carlo Salvato, and Wim Voordeckers.



Keith H. Brigham

Keith Brigham is Professor of Entrepreneurship, Director of the Tom Love Division of Entrepreneurship and Economic Development, and C. S. Trosper Chair at the Price College of Business, University of Oklahoma. His primary research and teaching interests focus on entrepreneurial cognition, temporal orientation, and family business. He is an Associate Editor of *Family Business Review*.

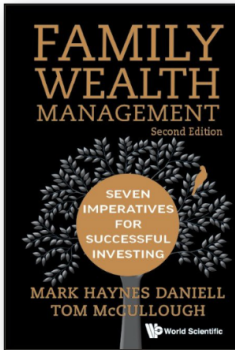


G. Tyge Payne
FFI Fellow

G. Tyge Payne is Professor of Entrepreneurship in the Stephenson Department of Entrepreneurship & Information Systems at Louisiana State University. His research explores the intersection of strategic management and entrepreneurship, often focusing on new, growing, and family-based businesses.

Tom McCullough

***Family Wealth Management: Seven Imperatives for Successful Investing* by Mark Haynes Daniell and Tom McCullough**



Family Wealth Management addresses a family's philosophy of wealth, the development and prioritization of goals, and the understanding, structuring and allocation financial assets. In addition, the authors provide clear insights on the specifics of investment management and engaging and educating the family and its members in wealth management. The seven imperatives, which make up the core of the book, serve as both a guide to the critical insights necessary for successful family wealth management, and also serve as a step-by-step process to help families develop and implement their own unique investment strategies, and achieve the full set of their family's related objectives.

***Wealth of Wisdom: Top Practices for Wealthy Families and Their Advisors* by co-editors Tom McCullough and Keith Whitaker**



In *Wealth of Wisdom*, Tom McCullough and Keith Whitaker deliver a comprehensive collection of practical activities that members of wealthy families can undertake to ensure their continued success and development. The book contains over 50 chapters, each written by a recognized expert in the field. The chapters highlight practical tools, exercises, and activities that can be applied by advisors or family members themselves.

FFI members who contributed to chapters in the book include FFI Fellow Patricia Annino, Josh Baron, FFI Fellow Doug Baumel, FFI Fellow Linda Bourn, FFI Fellow Dean Fowler, FFI Fellow Katherine Grady, FFI Fellow James Grubman, Barbara Hauser, Lee Hausner, FFI Fellow James E. Hughes, Jr., FFI Fellow Dennis Jaffe, Kristin Keffeler, Rob Lachenauer, FFI Fellow Greg McCann, Kathryn McCarthy, Keith Michaelson, Don Opatrny, Michelle Osry, Natasha Pearl, FFI Fellow Guillermo Salazar, FFI Fellow Ruth Steverlynck, FFI Fellow Christian Stewart, Małgorzata Smulowitz, FFI Fellow Blair Trippe, FFI Fellow Wendy Ulaszek, and Peter Vogel.

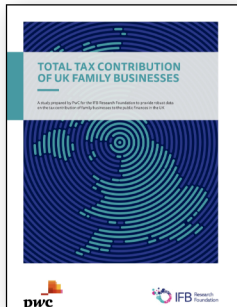


Tom McCullough
FFI Fellow

Tom McCullough is Chairman, CEO, and co-founder of Northwood Family Office, a Canadian multi-family office that provides customized, integrated financial advice and counsel to families of significant net worth. Tom is an adjunct professor of finance and executive-in-residence in the MBA program at the University of Toronto's Rotman School of Management and is a faculty member in Rotman's Family Wealth Management program.

PwC

The Total Tax Contribution of UK Family Businesses, a study prepared by PwC for the Family Business Research Foundation



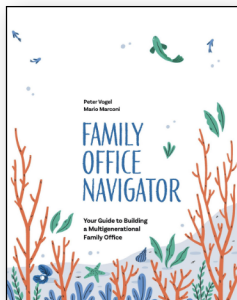
This report is the first of its kind, exploring in depth the tax contribution of family firms and providing a breakdown of taxes paid. It provides new evidence on the contribution that the family enterprise sector makes to the UK's public finances. The purpose of collecting up-to-date, robust data on family enterprises' critical contributions to the UK economy was to raise awareness and to aid understanding of the tax contribution from the sector and inform policy decisions.



PwC helps family businesses manage ownership and growth at every stage, by providing support with family governance, succession planning and business continuity, next generation education and transition, private wealth management and family office, philanthropy, values and purpose, and more. More than 100 PwC family business experts worldwide are FFI members.

Peter Vogel

Family Office Navigator by Peter Vogel and Mario Marconi



The *Family Office Navigator*, a collaboration with IMD Business School, Cambridge Family Enterprise Group, and the Family Business Network, offers enterprising families a comprehensive and practical guide to design a modern family office that considers the complexity of their family, wealth, and enterprise in turbulent times. It offers a new framework to help families grow their total family wealth across generations.

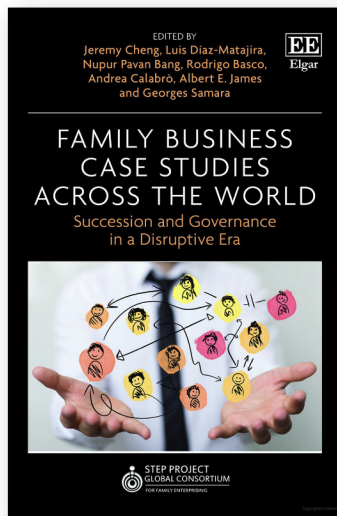


Peter Vogel

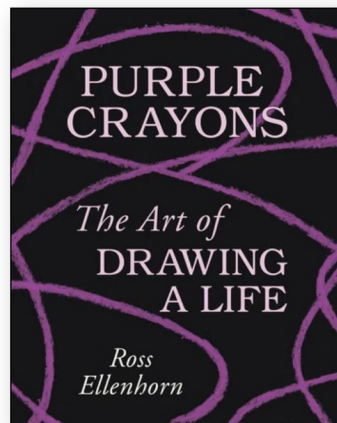
Peter Vogel is Professor of Family Business and Entrepreneurship and holder of the Debiopharm Chair for Family Philanthropy at IMD Business School in Lausanne. He is also the Director of IMD Global Family Business Center. In his research, teaching and advisory work, Peter works with families, owners, board members and executive teams of family enterprises and family offices globally. His work focuses on governance, change management, strategy and organizational renewal, succession planning and management, board and leadership development, and fostering entrepreneurialism.

In Case You Missed Them...

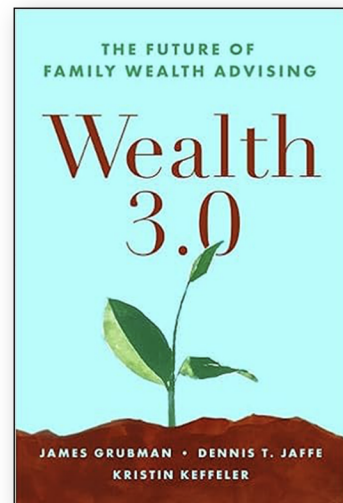
...explore these books, featured in *FFI on Friday* issues earlier this year, from the 2023 conference presenters.



Family Business Case Studies Across the World: Succession and Governance in a Disruptive Era, editors include Jeremy Cheng



Purple Crayons: The Art of Drawing a Life by Ross Ellenhorn



Wealth 3.0: The Future of Family Wealth Advising by James Grubman, Dennis Jaffe, and Kristin Keffeler

PREVIOUS EDITION



Today we conclude our 2023 series featuring the FFI organizational members. These distinguished organizations and educational institutions from around the world are increasing the global footprint of the field.

[READ MORE](#)

DATES TO REMEMBER

JAN
1

GEN Scholarships, Academic Awards, and Achievement Award nominations open

JAN
15

New year special rate for 2024 Conference registration ends
[MEMBERS ONLY](#)

JAN
21

Deadline for submitting 2024 conference proposals
[LEARN MORE AND SUBMIT](#)