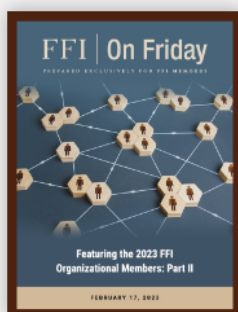




PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the 2023 FFI Organizational Members: Part II

FEBRUARY 17, 2023



**T**oday, we are pleased to continue our series featuring the FFI organizational members for 2023. These six members include distinguished organizations, associations, and educational institutions from around the world. Please read on to learn more about these organizations, which are increasing the global footprint of the field.

## AXIOM FINANCIAL STRATEGIES GROUP



**Axiom** is a full-service financial planning-based wealth management practice whose mission is to help individuals and families of all sizes grow and protect their wealth through objective, thoughtful advice, anchored in deep subject-matter expertise. Axiom's vision is to be thought leaders when helping others define their paths to happiness, leading with their core values of service, integrity, accountability, growth, and innovation.

FFI members include Michelle Konkle, FFI Fellow and GEN faculty member Vaughan Scott, Dax Whitehouse, and Ric Wrye.



**Michelle Konkle**



**Vaughan Scott**  
FFI Fellow  
GEN faculty



**Dax Whitehouse**



**Ric Wrye**

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## THE FAMILY BUSINESS CONSULTING GROUP



The **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 3,000 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, five of which are FFI Fellows.



**Craig E. Aronoff**  
FFI Fellow  
Richard Beckhard Practice Award  
Recipient



**Barbara Dart**  
FFI Fellow



**Michael L. Fassler**  
FFI Fellow



**Doug Gray**  
FFI Practitioner contributor



**David M. Karofsky**  
FFI Fellow



**John Ward**  
FFI Fellow  
Richard Beckhard Practice Award  
Recipient

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## GELLER ADVISORS

GELLER & COMPANY  
GELLER ADVISORS

**Geller Advisors** provides financial services and comprehensive family office solutions to high-net-worth individuals, families, non-profit foundations, and operating businesses. The firm is a wholly-owned subsidiary of Geller & Company and an SEC registered investment advisor.\* Geller Advisors delivers a wide array of services, including Investment Management, CFO Services, Tax Advisory Services, and Strategic Financial Planning.

FFI Members include Scott Bush, Martim de Arantes Oliveira, Brian Feliciano, Sara Gallucci, Mona Monahi, Paul Oliva, FFI Fellow and former board member Mark B. Rubin, and Rebecca Simone (Geller & Company).

*\*This registration does not imply any level of skill or training.*



**Scott Bush**



**Martim de Arantes Oliveira**



**Brian Feliciano**



**Sara Gallucci**



**Mona Manahi**



**Paul Oliva**



**Mark B. Rubin**  
FFI Fellow  
Former board member



**Rebecca Simone**



**Susan Sofronas**



## INSTITUUT VOOR HET FAMILIEBEDRIJF



The **Instituut Voor Het Familiebedrijf** (IFB) is a knowledge center for family businesses in Flanders. The IFB wants to inform, advise, and guide family businesses on all aspects that characterize family business. In this way, the Institute wants to contribute to the professionalization, continuity, and further development of family businesses in Flanders. Based on its ambition to be a thought leader for family business leaders, the Institute for Family Business takes initiatives regarding education, networking, research, advocacy, and international contacts.

The Institute's FFI members are FFI Fellow Sofie Lerut, FFI Fellow and former board member Józef Lievens, and Patrick De Schutter, the Institute's co-founder and co-managing director.



**Sofie Lerut**  
FFI Fellow



**Józef Lievens**  
FFI Fellow  
Former board member



**Patrick De Schutter**

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## LANSBERG GERSICK ADVISORS



**Lansberg Gersick Advisors** (LGA) is a global consulting and research firm. Founded in 1997 by Ivan Lansberg and Kelin Gersick, it was built on their longstanding collaboration as advisors and founding academics in the family enterprise field. For over 25 years, LGA has provided tailored advisory services and education to support family enterprise continuity across generations. Their global team serves leading family businesses, family offices, and family foundations wherever in the world they live, work and play.

FFI members include Catalina Arango, CFBA, and FFI Fellows include Neus Feliu, Kelin Gersick, Katherine Grady, Ivan Lansberg, Maria Dolores Moreno, and Wendy R. Ulaszek.

Lansberg Gersick Advisors is sponsoring the 2023 *Family Business Review* Best Article Award.



**Catalina Arango**  
CFBA



**Neus Feliu**  
FFI Fellow  
GEN Faculty



**Kelin Gersick**  
FFI Fellow



**Katherine Grady**  
FFI Fellow



**Ivan Lansberg**  
FFI Fellow



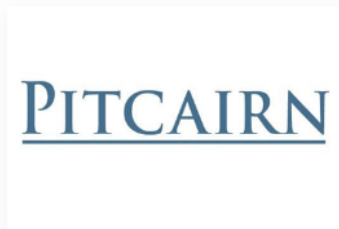
**Maria Dolores Moreno**  
FFI Fellow  
Former board member



**Wendy R. Ulaszek**  
FFI Fellow

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## PITCAIRN



Since its founding a century ago, **Pitcairn** has been dedicated to helping families sustain and grow their substantial, often complex financial assets and support their unique heritage across multiple generations. Using their comprehensive Wealth Momentum® family office model, Pitcairn provides every service wealthy families and family offices need across both financial and family dimensions.

FFI members include Leslie Voth, Chairman, CEO & President; Andy Busser, President, Family Office; Karen Carlson, ACFWA; Amy Hart Clyne, CFBA, Chief Knowledge & Learning Officer; Laura Kremp; Laurie R. Martin; J. Matthew McCarte; Andrew Pitcairn; and Mark Robinson.

Pitcairn is sponsoring the Fellows Breakfast at the 2023 FFI Global Conference in New York.



**Andy Busser**



**Karen Carlson**  
FFI Fellow



**Amy Hart Clyne**  
CFBA



**Laura Kremp**



**Laurie R. Martin**



**J. Matthew McCarte**



**Andrew Pitcairn**



**Mark Robinson**



**Leslie Voth**

## FFI ORGANIZATIONAL MEMBERS

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.

[VIEW COMPLETE LISTING](#)

## AN INVITATION TO JOIN A NEWLY FORMING VIRTUAL STUDY GROUP

A new Virtual Study Group on Systems Thinking is being formed. The chair is Wanja Michuki, with co-chairs Jeff Scott and Bernadette Watowich-Stead. The VSG plans to meet monthly and hold open discussions on systems thinking and analysis concepts and their applications to the work of advisors and their self-awareness.

[APPLY TO JOIN THIS NEW VSG](#)

## PREVIOUS EDITION



**Nominations are now being accepted for the 2023 Achievement Awards.**

For more than thirty years, these four awards have widened in scope to honor the accomplishments of leaders in the field and to increase public awareness of the variety of skills and perspectives needed to work successfully with multi-generational families in business.

[READ MORE](#)



## DATES TO REMEMBER

FEB  
27

First meeting of the Systems Thinking Virtual Study Group

[LEARN MORE ABOUT VSGS AND APPLY](#)

MAR  
2

Regional Reception in New York City at the Marriott Marquis

[REGISTER HERE](#)

MAR  
31

Last day to register for 2023 FFI conference at the reduced Winter Rate

[REGISTER HERE](#)

APR  
01

Deadline for Best Doctoral Dissertation Submissions

[VIEW DETAILS](#)

Deadline for Best Unpublished Research Paper Submissions

[VIEW DETAILS](#)

MAY  
01

Application Deadline for FFI GEN Scholarships

[VIEW DETAILS](#)