



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the 2023 FFI Organizational Members

JANUARY 27, 2023



In this issue, we are pleased to feature six organizations that are FFI organizational members for 2023. These members include distinguished organizations, associations, and educational institutions from around the world. This issue will be the first in a continuing series throughout the year.

## 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, Lori Quinn, and Emily Zobian.



**Linda Bourn**  
FFI Fellow



**Courtney Eber**



**Paul Funk**



**Steven Kent**



**Lori Quinn**



**Emily Zobian**

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## CFAR



Originally a research center inside the Wharton School, **CFAR** is a private management consulting firm that has served the entire family enterprise from offices in Philadelphia and Boston for four decades. CFAR helps family enterprise leaders address complex issues at the intersection of economics and relationships, including strategy, culture, succession, governance, conflict resolution and leadership development.

FFI members include Debbie Bing, Nancy Drozdow, Megan Helzner, Katelyn Husereau, Sara Miller-Paul, Daphnie Pierre, Todd Smith, and Caleb White.

CFAR was a sponsor of the 2022 global conference.



**Debbie Bing**  
FFI Fellow  
FFI board chair  
2022 conference presenter



**Nancy Drozdow**  
FFI Fellow



**Megan Helzner**  
2022 conference presenter



**Katelyn Husereau**  
CFBA  
2022 conference presenter



**Sara Miller-Paul**  
2022 conference presenter



**Daphnie Pierre**  
2022 conference presenter



**Todd Smith**



**Caleb White**

2022 conference presenter

Chair of the 2022 Boston-Cambridge conference committee

## COUTTS & CO.



**Coutts & Co.** has a 330-year history of working with families in business starting from its origins as a family run business itself, focusing on the contribution these companies and families make to global economies and societies. The Coutts Institute provides business families with advice and expertise on themes such as family governance, business and wealth succession, philanthropy and next generation education.

FFI members are Alexandra Delcea, Rachel Harrington, Stuart May, Victoria Papworth, and Irene Wolstenholme.



**Alexandra Delcea**  
CFBA/CFWA



**Rachel Harrington**  
CFBA/CFWA



**Stuart May**  
CFBA/CFWA



**Victoria Papworth**



**Irene Wolstenholme**  
CFWA

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## FAMILY OFFICE EXCHANGE



**Family Office Exchange** (FOX) is a peer-to-peer network for ultra-wealthy families and their family offices and advisors 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, Hilary Leav, Peter Moustakerski, Scott Muench, Matthew Murphy, Mia Starr, David Toth, and Scott A. Winget.



**Mindy Earley**  
CFBA



**Gabrielle Griffin**



**Sara Hamilton**



**Hilary Leav**



**Peter Moustakerski**



**Scott Muench**



**Matthew Murphy**



**Mia Starr**



**David Toth**



**Scott A. Winget**

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## 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 and Marlis Jansen.



**Kjartan Jansen**  
CFBA



**Marlis Jansen**



# JÖNKÖPING INTERNATIONAL BUSINESS SCHOOL



The **Centre for Family Entrepreneurship and Ownership (CeFEO)** at **Jönköping International Business School (JIBS)** is one of the leading research environments worldwide in family business studies, with more than 60 scholars and 25 affiliated researchers, plus a large turnover of visiting scholars. While having a specific focus on ownership and family business issues, researchers associated with CeFEO also conduct extensive and impactful research on topics like strategy, organization, accounting, entrepreneurship, innovation, and internationalization.

FFI members include Hanna Almlöf, CeFEO Director Massimo Baù, Joaquín Cestino Castilla, Kajsa Haag, Josh Hsueh, Carla Machado, Leif Melin, Mattias Nordqvist, Daniel Pittino, and Marcela Ramirez Pasillas.



**Hanna Almlöf**  
2022 conference presenter



**Massimo Baù**  
FFI Fellow  
2022 conference presenter  
Best Dissertation Award committee



**Joaquín Cestino Castilla**



**Kajsa Haag**  
CFBA/CFWA  
2022 conference presenter  
Best Dissertation Award committee



**Josh Hsueh**  
2021 FBR Outstanding Reviewer Award



**Carla Gonçalves Machado**



**Leif Melin**

Former FFI board member  
2012 FFI International Award



**Mattias Nordqvist**

FFI Fellow  
*FBR* Associate Editor  
2011, 2005 Best Unpublished Research  
Paper Awards



**Daniel Pittino**



**Marcela Ramirez Pasillas**

## 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](#)



**FOUR DAYS LEFT TO SUBMIT A PROPOSAL!**



**2023 FFI GLOBAL CONFERENCE**  
October 25-28, 2023 · New York, NY

**Submit your proposal for the 2023 Global Conference by January 31.**

[LEARN MORE AND SUBMIT](#)

## **AN INVITATION TO JOIN THE SYSTEMS THINKING VIRTUAL STUDY GROUP**

A new Virtual Study on Systems Thinking is being formed. The chair is Wanja Michuki, with co-chairs Jeff Scott and Bernadette Watowich-Stead. This 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 HERE TO JOIN THIS NEW VSG](#)

## PREVIOUS EDITION



FFI is fortunate to have a generous and expansive community of members whose contributions to the field and to FFI are well known around the world. This year we are pleased to announce that five GEN scholarships are available. There are four scholarships designated for core certificate applicants and one for advanced certificate applicants.

Applications for the 2023 FFI GEN Scholarships are now open and must be received by May 1, 2023. Recipients will be notified by June 15 and may begin their program on July 1, 2023. All certificate program requirements must be completed within one year.

Go [here](#) to apply for any of the scholarships listed below. Applicants do not have to be members of FFI.

[READ MORE](#)



## DATES TO REMEMBER

JAN  
31

Last day to submit a proposal for the 2023 annual conference

[SUBMIT YOUR PROPOSAL](#)

Last day to enroll in GEN Q1 courses at 2022 rates

[LEARN MORE AND ENROLL](#)

MAR  
2

Regional Reception in New York City at the Marriott Marquis

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](#)