



PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the Chair

MARCH 17, 2023



In this week's issue we are pleased to bring you an update from FFI board chair, Debbie Bing, following the FFI board retreat earlier this month at the Marriott Marquis in Times Square, New York City.

Dear Colleagues,

It was a pleasure to chair this year's FFI board retreat which included Carlo Salvato, vice-chair; Ken McCracken, secretary; Sandra McNeely, treasurer; board members Patricia Angus, Richa Arora, Jeff Cobb, Mary Duke, Heinz-Peter Elstrodt, Dan Frosh, Panikkos Poutziouris, Jon Ramos, Sanjay Sharma, and legal counsel Michael Connelly; Judy Green, FFI president; and Briggett Owens, GEN and conference coordinator.

The retreat was preceded on Thursday by a meeting of the 2023 conference program committee and a regional reception for FFI members and friends in NYC, including members of the Bocconi Alumni Association.

The board retreat began officially on Friday afternoon and was organized around FFI's three strategic pillars: **Research, Public Awareness, and Education.**

PILLAR I: RESEARCH

First on the agenda was Pillar I: Research, which included reports on *Family Business Review* (presented by Carlo Salvato) and the 2086 Society. The Board had the opportunity to kick off the work of 2086 Society Scholar-in-Residence Jason Jay with a Zoom presentation on his research project this year, Systemic Family Investing.

Jason is lined up for an exciting series of events with FFI over 2023. You can read more about Jason's work in the [March 3](#) issue of *FFI on Friday*. Up next on May 3 is a virtual session with Jason and the GEN alumni and current enrollees.

PILLAR II: PUBLIC AWARENESS

On Saturday, the Board considered Pillar II: Public Awareness from two angles. The first segment explored opportunities that might exist in the near and long-term future with our active organizational members and Asian Circle participants. This discussion was led by Heinz-Peter Elstrodt, who had conducted a series of interviews with members in the area prior to the board retreat.

Second, Dan Frosh, board member and managing editor of *FFI Practitioner*, presented some amazing data on our weekly digital publication. Included was that the open rate had risen from 29% in 2021 to 41% in 2022, benchmarked against an industry standard of 18%. Also noteworthy was the statistic that in 2022, more than 4000 people around the world listened to the *FFI Practitioner* podcasts. Many opportunities lie ahead for this publication. Thanks to the authors, the podcast presenters, and, of course, all the readers and listeners. Please consider writing for *FFI Practitioner* in 2023! FYI: all back issues are available on www.ffipractitioner.org.

PILLAR III: EDUCATION

We then turned to Pillar III: Education, which includes the GEN program and the annual conference. The GEN program continues to thrive, and we were pleased to have new board member Jeff Cobb, whose expertise is in online professional education, provide insights on where virtual education is going and suggest additions and improvements that can be made to the GEN program. Jeff will lead a task force, convening in the next few weeks and reporting back to the board in a few months, on next steps for the program.

The board then broke into small groups to discuss the upcoming conferences, including formats and locations. The 2023 conference will be in NYC and the 2024 conference will be in London.

2023 NOMINATING COMMITTEE

The rest of Saturday was spent in discussion with the 2023 Nominating Committee, reviewing expectations for current and future board members as well as how the board composition reflects the strategic initiatives. An invitation will go out in the March 24 issue of *FFI on Friday* with more details from the Nominating Committee and the possibility of submitting names for consideration as future board members.

The meeting adjourned late Saturday afternoon, and we all agreed that it is a pleasure and honor to be in leadership roles for this extraordinary organization amid a time of such growth and opportunity.

Looking forward to connecting with many of you in the coming months through the exciting opportunities in store for 2023.



Cordially,

A handwritten signature in black ink, appearing to read 'Debbie Bing'.

Debbie Bing

Chair

Attorneys for Family-Held Enterprises 2023 Spring Conference

Registration is open for the AFHE Spring Conference, April 20-21, in Chicago. FFI members register at a discounted rate.

[LEARN MORE AND REGISTER](#)

ELEVENTH ANNUAL SCHLESINGER GLOBAL FAMILY ENTERPRISE CASE COMPETITION (SG-FECC)

Registration is open for the SG-FECC at the UVM Grossman School of Business. **Register by June 15.**

[LEARN MORE AND REGISTER](#)

DATES TO REMEMBER

MAR
31

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

[REGISTER NOW](#)

APR
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Deadline for Best Doctoral Dissertation Submissions

[VIEW DETAILS](#)

Deadline for Best Unpublished Research Paper Submissions

[VIEW DETAILS](#)

MAY
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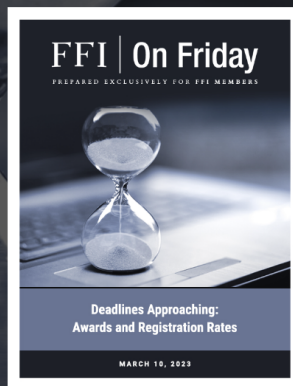
Application Deadline for FFI GEN Scholarships

[VIEW DETAILS](#)

Deadline to submit Achievement Award Nominations

[VIEW DETAILS](#)

PREVIOUS EDITION



Several key deadlines are approaching in the next few weeks!

Please don't miss them—all members are encouraged to participate. Please forward this newsletter to others you think might be interested. Applicants and registrants do not have to be members of FFI.

[READ MORE](#)