



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the 2023 FFI Organizational Members: Part VIII

NOVEMBER 03, 2023



**T**oday, we are pleased to continue our series featuring the FFI organizational members for 2023. These six distinguished organizations are increasing the global footprint of the field.

# CLAIRMONT TRUST



**Clairmont Trust**, based in the Bahamas, is committed to providing comprehensive wealth structuring services and investment advice for each client. It offers wealth structuring and family advisory services, corporate and family governance, expert fiduciary services, and family office services.

Clairmont's FFI members are Ana Maria Correa, Beltran Domecq, FFI Fellow Miles Evans, FFI Fellow James Hoar, John Jephson, Rene Sonneveld, and FFI Fellow and former board member James Stewart.



**Ana Maria Correa**



**Beltran Domecq**



**Miles Evans**

FFI Fellow  
2024 Conference  
Program committee  
chair



**James Hoar**

FFI Fellow  
2024 Conference  
Program committee



**John Jephson**



**Rene Sonneveld**



**James Stewart**

FFI Fellow

---

## DELAWARE VALLEY FAMILY BUSINESS CENTER



Since 1988, **Delaware Valley Family Business Center (DVFBC)** has been guiding multigenerational family enterprises through the unique complexities they face. The Center's intergenerational, team-building process provides enterprising families with the education and guidance to help develop structures and policies that align with their values and goals, transform family relationships, and build sustainable enterprises.

FFI members are Lindsay Albright, FFI Fellow Sally A. Derstine, Henry D. Landes, and Joy Sawatzky.



**Lindsay Albright**



**Sally A. Derstine**  
FFI Fellow



**Henry D. Landes**



**Joy Sawatzky**

---

## FIDELIUS FAMILY OFFICE



**Fidelius Family Office** is a trusted advisor to a select group of families across the Americas, ensuring every family finds their ideal set of solutions and providers for every key aspect of governance in family, business, ownership, and wealth. Fidelius offers only one product: expert and tailored guidance, always in the family's best interest.

FFI members are Luisa Cardona, CFBA/CFWA, Alicia Gerrits, Lisseth Herrera, Ernesto Lewin, CFBA/CFWA, and FFI Fellow Rodolfo J. Paiz.

Rodolfo Paiz received the 2022 FFI International Award, was part of the 2023 Conference Program Committee, and presented the session "Salvation or Snake Oil? A Deep Dive Into Family Protocols" at the 2023 global conference.



**Luisa Cardona**  
CFBA/CFWA



**Alicia Gerrits**



**Lisseth Herrera**



**Ernesto Lewin**  
CFBA/CFWA



**Rodolfo J. Paiz**  
FFI Fellow  
GEN Faculty  
2022 International  
Award  
2023 Conference  
Program committee

---

# HEC MONTRÉAL



**HEC Montréal** is a French-language university institution offering internationally renowned management education and research. **HEC houses the Chair of Succession and Family Enterprise** whose members carry out academic research, teaching, and business advisory services on business strategy, entrepreneurship, organization design, ownership structure, and leadership succession. HEC Montréal offers courses at the Masters and Doctoral level in family business.

FFI members are Catherine Beaucage, Cécile Bertin, Pierre Cavallé, Luis Felipe Cisneros Martinez, Audrey-Anne Cyr, Gaëlle Hamon, Isabelle Le Breton-Miller, Danny Miller, Jorge H. Mejia-Morelos, and Naomi Thibonnet.



**Catherine Beaucage**



**Cécile Bertin**



**Pierre Cavallé**



**Luis Felipe Cisneros  
Martinez**



**Audrey-Anne Cyr**



**Gaëlle Hamon**



**Isabelle Le Breton-  
Miller**

FFI Fellow  
2017 Barbara Hollander  
Award  
2007 & 2009 Best  
Unpublished Research  
Paper Awards



**Danny Miller**  
FFI Fellow  
2017 Barbara Hollander  
Award  
2007 & 2009 Best  
Unpublished Research  
Paper Awards



**Jorge H. Mejia-Morelos**



**Naomi Thibonnet**



## HSBC PRIVATE BANKING



As part of the HSBC Group, one of the world's largest banking and financial services organizations, **HSBC Private Banking** seeks to be the leading international private bank for business owners and their families. It provides clients with wealth, business, and family succession solutions in the largest and fastest growing markets around the world.

FFI members are FFI members are FFI Fellow Edith Ang, Mary Chan, David Chiu, Andra Ilie, Henry Lam, Horace Lau, Andy Leung, Ann Ling, Aik-Ping Ng, Yiyang Shi, and Kelvin Zhuang.



**Edith Ang**  
FFI Fellow



**Mary Chan**



**David Chiu**



**Andra Ilie**



**Henry Lam**



**Horace Lau**



**Andy Leung**



**Ann Ling**



**Aik Ping Ng**  
CFBA/CFWA



**Yiyang Shi**



**Kelvin Zhuang**

---

## WINGSPAN LEGACY PARTNERS



Christina Wing founded **Wingspan Legacy Partners** to help founders and families navigate the intersections of family dynamics, business operations, wealth, legacy, and philanthropic impact. Wingspan works with enterprise families to provide purpose-built, long-term solutions and support for multigenerational success across family, business, wealth, and giving. Wingspan's client families comprise a global network of like-minded leaders who connect and learn as peers.

FFI members include Everett Alexander, Liz Breiter, Maryann G. Bell, JJ Langston, Vicki Morton, Abby Patrick, Kara Perusse, Liza Truax, and Christina Wing.



**Everett Alexander**



**Liz Breiter**



**Maryann G. Bell**



**JJ Langston**



**Vicki Morton**



**Abby Patrick**



**Kara Perusse**



**Liza Truax**



**Christina Wing**

## 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](#)

## FFI ANNUAL MEETING (VIRTUAL)

November 7, 2023, 9:30 AM Eastern

[Register via email invitation link](#)

## PREVIOUS EDITION



This week's *FFI on Friday* continues our series on the FFI Virtual Study Groups. These study groups are online forums to educate, connect, and inspire FFI members, and they are a way for practitioners to connect globally based on their interests.

[READ MORE](#)