



2023 FFI GLOBAL CONFERENCE  
October 25-27, 2023 · New York, NY

PREPARED EXCLUSIVELY FOR FFI MEMBERS

# Featuring the Global Conference Sponsors: Pre- Conference Sessions and Keynotes

SEPTEMBER 22, 2023



**T**oday's issue will highlight the sponsors of the FFI Global Conference in October. We begin with the sponsors of the pre-conference sessions and the sponsors of the keynotes. A second issue of conference sponsors will appear next week.

## PRE-CONFERENCE SESSIONS

**Wednesday, October 25**

**All the World's a Stage**

**Sponsored by CFAR and Geller Advisors**

The 2023 FFI Conference is taking place in the theater capital of the world, so let's take advantage! Join FFI for an afternoon at The Shed, one of New York City's newest and most innovative cultural venues, located just a 15-minute walk from the Marriott Marquis.

While overlooking the Vessel and newly developed Hudson Yards area of Manhattan, participants will have the opportunity to chat with a panel of theater practitioners about their unique approaches to making art. Together, participants will draw parallels between how both artists and advisors work creatively to solve complex problems, collaborate with others, and apply interdisciplinary thinking.

### Pre-Conference Session Sponsors



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.

**GELLER & COMPANY**  
**GELLER ADVISORS**

**Geller Advisors**, a wholly-owned subsidiary of Geller & Company, provides financial services to high-net-worth individuals, families, non-profit foundations and operating businesses.

Advanced registration is required. Go [here](#) to register for the pre-conference session.

## Future-Proof Your Family Office

Sponsored by EisnerAmper

We are in the next new normal for family offices. More than \$15 trillion will transition by 2030 and many of those assets are in family offices globally. That means we want to ensure that the vehicle preserving the family wealth is ready, able, and agile. We will go over some strategies to enhance the family office structural and human capital as well as getting your client's family office ready for the future. You will hear from experts in the changing dynamics of the family, cybersecurity, tax strategies to enhance the family's wealth, and family office outsourced solutions. Come with your questions for this riveting discussion.

### Pre-Conference Session Sponsor



EisnerAmper is among the nation's largest full-service advisory and accounting firms, providing comprehensive audit, accounting, advisory, consulting and tax services.

Advanced registration is required. Go [here](#) to register for the pre-conference session.

## Reshaping Reality: Cultivating a Sense of Ownership and Purpose in the Family Office

Sponsored by **Generation6**

Sustaining a family office takes more than just financial success. It also requires developing a sense of ownership (rather than a client-mindset) within the family for the governance and direction of the family office. Yet, very often, structural solutions are used to hold the family together and tied to the family office. However, real cohesion is built around relationships and meaningful connections. Tending to building relationships across generations is therefore paramount for the continuity of the family and the family office. Explore how to unlock the potential of the Single Family Office in today's fast-paced world, and the importance of empowering the rising generation of family leaders by sharing information, instilling a sense of responsibility, learning together across generations, and cultivating a clear purpose beyond financial returns.

### Pre-Conference Session Sponsor



**Generation6** is an advisory firm based on decades of experience working with, educating, and researching enterprising families from around the world.

Advanced registration is required. Go [here](#) to register for the pre-conference session.

## KEYNOTES

**Wednesday, October 25**

### **Opening Keynote: Creating Waves: How a systemic investing approach can benefit your clients, your practice and impact the world**

**Sponsored by the 2086 Society**

In times of disruption, we can either be hit by the wave, harness the wave, or create the wave. Given that family enterprises comprise an estimated 50%-80% of global GDP, there is a significant opportunity to “create the wave” and impact the current global environment. In his new approach, Systemic Investing, Jason Jay expands John Davis’s classic Three-Circle Model and gives case examples of how systemic investing is creating waves for family enterprises and their advisors and is impacting the world.

**Jason Jay, MIT Sloan School of Management, 2023 FFI Scholar-in-Residence**

#### Keynote Sponsor: 2086 Society

**FFI | The 2086 Society**

The **2086 Society** was created in 2018 to reinforce *FFI's* role as a leader in advancing the field of family enterprise through its core strategies of education, research, and public awareness — and to build on its mission to be the most influential global network of thought leaders in the field of family enterprise.

**Thursday, October 26**

**Thursday Keynote: It's A Family Affair: Conquering New York, from Revolution to Rising Seas**

**Sponsored by Abbey Legacy, Angus Advisory Group, and Green Associates**

Independent historian Barnet Schecter will present a richly illustrated, in-depth exploration of New York City through space and time—all the way down to the bedrock. With a focus on the city's family enterprises, fiercely competitive environment, and contested terrain, he will survey its history, from Dutch settlement, English conquest, and American independence, through civil war, world wars, pandemics, and global warming. Finally, his keynote will look to the future and the prospects for family firms (and everyone else) in an urban archipelago amidst rising seas.

**Barnet Schecter, Barnet Schecter Historical Consulting, LLC**

**Keynote Sponsors: Abbey Legacy, Angus Advisory Group, and Green Associates**



**Abbey Legacy** has an innovative, practical approach to family business consulting. Sandra McNeely, the founder and managing director of Abbey Legacy, uses this approach to resolve very practical dilemmas that get in the way of organizational excellence.



**Angus Advisory Group** consults to individuals, families, and organizations on family wealth, business, philanthropy, and related issues. Independent teams of professional advisors are created for each client engagement and are led by Patricia Angus, who founded the firm in 2003.



**Green Associates, LLC** specializes in association management and fundraising for non-profit organizations. Green Associates combines a wide range of high-quality consulting services with a commitment to understanding and facilitating clients' diverse and changing strategic and administrative needs.

**Friday, October 27**

**Closing Keynote: Women and the Future of Work: Within  
and without the multi-generational family**

**Sponsored by REGENERATION**

Dr. Grace Lordan is the Founding Director of The Inclusion Initiative and an Associate Professor at the London School of Economics and Political Science. An economist and a labor market skills expert, Grace focuses her research on inclusive leadership, women's progress in the workplace, the future of work, productivity through diversity, and individual success. Grace served as an expert advisor to the UK government sitting on their skills and productivity board, is currently a member of the UK government's BEIS social mobility taskforce, and is on the Women in Finance Charter's advisory board.

**Grace Lordan, Founding Director of The Inclusion Initiative and Associate Professor at the London School of Economics and Political Science**

**Keynote Sponsor: REGENERATION**



**REGENERATION** has focused on supporting family businesses for more than 25 years, helping clients increase business and wealth while strengthening their families.

## PREVIOUS EDITION



FFI members continue to lead research and provide 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!

[READ MORE](#)

## DATES TO REMEMBER

SEPT  
**25**

Last day to vote in the 2023 FFI Board election

SEPT  
**30**

FFI conference hotel block at special rate ends

[BOOK TODAY](#)

OCT  
**25-27**

Annual FFI Global Conference in New York

[LEARN MORE AND REGISTER](#)

NOV  
**07**

FFI Annual Meeting (Virtual)