



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

PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the Global Conference Sponsors: Thursday and Friday Events, Conference Resources, Awards & Scholarships

SEPTEMBER 29, 2023



Today we continue to feature the sponsors of the FFI Global Conference in October. This issue includes sponsors of conference events on Thursday, October 26, and Friday, October 27, conference resources, and awards.

THURSDAY AND FRIDAY EVENTS

Bernstein Private Wealth Management



Bernstein Private Wealth Management advises high net worth clients on planning for and living with the complexities that come with wealth. Bernstein specializes in addressing challenges that extend well beyond wealth management by offering a vast network of resources personalized to clients' values and needs.

Bernstein Private Wealth Management is sponsor of the invitation-only Speakers & Sponsors Reception on Thursday, October 26.

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.

Pitcairn is sponsor of the Fellows Breakfast on Friday, October 27.

FFI Board of Directors

For more than thirty years, the Family Firm Institute (FFI) has engaged in educating, connecting, and inspiring professionals who serve family enterprises. Its mission is to be the most influential global network of thought leaders in the field of family enterprise. The **FFI Board of Directors** provides strategic vision and oversight for the ongoing development of the organization and the field.

FFI Board of Directors is sponsor of the Awards and GEN Luncheon on Thursday, October 26.

RESOURCES

Cambridge Family Enterprise Group



Cambridge Family Enterprise Group, founded in 1989, is a highly specialized, international advisory firm serving family enterprises. It is devoted to helping families achieve multi-generational success for their families, enterprises, and financial wealth.

Cambridge Family Enterprise Group is sponsor of the conference lanyards.

Geller Advisors



Geller Advisors provides strategic financial, wealth management, tax, and consulting services to individuals and families of significant wealth, and their affiliated operating businesses and foundations.

Geller Advisors is sponsor of the name badges.

KPMG Family Office



KPMG Family Office works with private business clients, family offices, and successful individuals and families to navigate life changes, reach milestones, and face the future with confidence. Their forward-looking team provides wholly unbiased advice and multi-generational planning tailored to the unique needs of UHNW individuals and families across Canada.

KPMG Family Office is sponsor of the conference app.

AWARDS & SCHOLARSHIPS

de Visscher Advisors



de Visscher Advisors assists its clients in developing and analyzing financial solutions for the liquidity needs of the shareholders, the capital needs of the business, or both while designing highly effective family and corporate governance structures to assure the long-term sustainability of the family wealth across generations

**de Visscher Advisors is sponsor of the
de Visscher Advisors Scholarship.**

Heinz-Peter Elstrodt

Heinz-Peter Elstrodt, PhD, is an advisor to and board member of family businesses and a guest lecturer at London Business School. He is also a Senior Partner Emeritus at McKinsey & Company. In his long career as a Senior Partner with McKinsey, he founded and led McKinsey's global Family Business practice.

**Heinz-Peter Elstrodt is sponsor of the Latin American –
Caribbean Scholarship.**

Fitzpatrick & Francis Family Business Continuity Foundation

Fitzpatrick & Francis Family Business Continuity Foundation is dedicated to providing financial support for the training and education of family business advisors either through grants directly to individuals or to institutions that provide education and training to individuals.

**Fitzpatrick & Francis Family Business Continuity Foundation is
sponsor of the Fitzpatrick & Francis Family Business
Continuity Foundation Scholarship.**

Green Associates



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.

**Green Associates is sponsor of the Diversity, Equity, and
Inclusion (DE&I) Scholarship.**

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.

Lansberg Gersick Advisors is sponsor of the *Family Business Review* Best Article Award.

Relative Solutions



Relative Solutions LLC is a pioneer in the field of family enterprise. Relative Solutions works with families on issues of governance, strategic planning, philanthropy, or the meaning and impact of wealth, tailoring its offerings to the client's strengths in pursuit of sustainable and resilient transgenerational family enterprises.

Relative Solutions is sponsor of the Best Unpublished Research Paper Award.

The University of Vermont Grossman School of Business



The University of Vermont Grossman School of Business develops leaders of sustainable businesses that address complex economic, social, and environmental challenges in a dynamic global environment. Its Family Business Institute pioneers family business research and education at the heart of business as a force of good for our planet and people. FFI's collaboration with the Schlesinger Global Family Enterprise Case Competition (SG-FECC) at Grossman has been in place since 2013.

University of Vermont Grossman School of Business is sponsor of the Best Doctoral Dissertation Award.

Waesche Family

Randy Waesche is an FFI Fellow and has more than 40 years of experience in the family service industry.

The Waesche Family is sponsor of the *FBR* Outstanding Reviewer Award and the Waesche Family Scholarship.

THANK YOU TO THE 2023 CONFERENCE SPONSORS

Abbey Legacy

Angus Advisory Group LLC

Bernstein Private Wealth Management

Cambridge Family Enterprise Group

CFAR

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FFI 2086 Society

FFI Board of Directors

Geller Advisors

Generation6

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IMD

KPMG Family Office

Lansberg Gersick Advisors

Pitcairn

REGENERATION

PREVIOUS EDITION



Today'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.

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DATES TO REMEMBER

OPEN
NOW

Register for the FFI Global Conference Pre-Conference Sessions
All the World's a Stage

[LEARN MORE AND REGISTER](#)

Future-Proof Your Family Office

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

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SEPT
30

FFI conference hotel block at special rate ends

[BOOK TODAY](#)

OCT
25-27

Annual FFI Global Conference in New York

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NOV
07

FFI Annual Meeting (Virtual)