



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Featuring the 2024 FFI Organizations: Part IX

NOVEMBER 22, 2024



Today we conclude our 2024 series featuring the FFI organizational members. These members include distinguished educational institutions, associations, and professional organizations from around the world. Please read on to learn more about six of these organizations, which are increasing the global footprint of the field and contribute invaluable knowledge and experience to the wider FFI membership.

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. The Family Enterprise Risk Practice provides a suite of specialty insurance services that address the unique and complex risks of the family enterprise, whether it's a family office, operating, or holding company.

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



AXIOM FINANCIAL STRATEGIES GROUP



Axiom is a full-service financial planning-based wealth management practice whose mission is to help individuals and families of all sizes grow and protect their wealth through objective, thoughtful advice, anchored in deep subject-matter expertise. Axiom's vision is to be thought leaders when helping others define their paths to happiness, leading with their core values of service, integrity, accountability, growth, and innovation.

FFI members include Michelle Konkle, FFI Fellow and GEN faculty member Vaughan Scott, Dax Whitehouse, and Ric Wrye.



Michelle Konkle



Vaughan Scott

FFI Fellow
GEN faculty



Dax Whitehouse



Ric Wrye

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 FFI Fellow Debbie Bing, FFI Fellow Nancy Drozdow, Megan Helzner, Sara Miller, Eliza Orleans, Daphnie Pierre, Todd Smith, and Caleb White.

CFAR was a sponsor of the 2024 FFI Global Conference.



Debbie Bing
FFI Fellow
FFI board chair



Nancy Drozdow
FFI Fellow



Megan Helzner



Sara Miller



Eliza Orleans



Daphnie Pierre



Todd Smith



Caleb White

GELLER



Geller provides sophisticated wealth management, family office, and strategic advisory services to individuals and families of significant wealth, and their affiliated operating business and foundations. The firm's centralized suite of services include Investment Management, Strategic Financial and Wealth Planning, Tax Advisory and Compliance, Personal CFO Services, and Cyber Advisory and Support.

FFI members include FFI Fellow and former board member Mark Rubin, Scott Bush, Martim de Arantes Oliveira, Brian Feliciano, Mona Monahi, Paul Oliva, Alexandra Pielusko, Rebecca Simone, and Tracey Stoecklin.

Geller was a sponsor of the 2024 FFI Global Conference.



Scott Bush



**Martim de Arantes
Oliveira**



Brian Feliciano



Mona Manahi



Andrea Nodoro



Paul Oliva



Alexandra Pielusko



Mark B. Rubin
FFI Fellow



Rebecca Simone



Tracey Stoecklin



INSTITUUT VOOR HET FAMILIEBEDRIJF



The **Institute for Family Business (Instituut voor het Familiebedrijf)** is a knowledge center for family businesses in Flanders. The IFB wants to inform, advise, and guide family businesses on all aspects that characterize family business. In this way, the Institute wants to contribute to the professionalization, continuity, and further development of family businesses in Flanders. Based on its ambition to be a thought leader for family business leaders, the Institute for Family Business takes initiatives regarding education, networking, research, advocacy, and international contacts.

The Institute's FFI members are the Institute's co-founder and co-managing director Patrick De Schutter, Laura Lannoo, FFI Fellow Sofie Lerut, and FFI Fellow Józef Lievens.



Patrick De Schutter



Laura Lannoo



Sofie Lerut
FFI Fellow



Józef Lievens
FFI Fellow

THARAWAT MAGAZINE



Tharawat Magazine, established in 2008, is a multimedia publication for family enterprises. We share leadership and feature stories from hundreds of business leaders across dozens of countries, offering unique insights into building lasting businesses.

Tharawat Magazine also produces *The Family Business Voice* podcast, highlighting families demonstrating exceptional leadership and sustainable practices. Published by Orbis Terra Media, a family-owned publisher and content marketing agency in Switzerland, Tharawat Magazine inspires and empowers families to create enduring legacies.

Tharawat's members are Kandyce Angel, Farida El Agamy, Ramia El Agamy, and Shereen El Agamy.



Kandyce Angel



Farida El Agamy



Ramia El Agamy



Shereen El Agamy

ANNOUNCING A NEW VIRTUAL STUDY GROUP

We are pleased to announce the formation of a new FFI Virtual Study Group, with the working title Advancing Advisory and Research Practice by Fostering Cross-Cultural Connections across Africa.

About the Group

The purpose of this VSG is to enhance the practitioner ecosystem by offering best-practice tools, research, and insightful discussions to VSG members across Africa's incredibly diverse landscape.

Membership in the group is open to FFI African members as well as other FFI members who are interested in understanding the complex socio-economic and geopolitical dynamics of the world's second-largest continent.

A primary objective is to advance the growth and development of family-owned enterprises in Africa by setting best-practice standards and shaping the future of practice across the region for advisors and researchers in the family enterprise field.

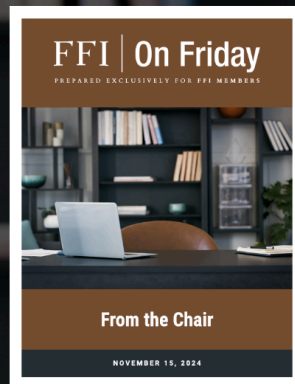
Active participation will be essential, and VSG members will be invited to bring questions, share experiences, and learn from one another. Each session will focus on a specific topic affecting the dynamics advising and researching African family-owned enterprises, drawing from research data, professional experience, and practical insights.

This new VSG is being organized and chaired by Jean Meeks-Koch, PhD, FFI Fellow, and co-chaired by Dennis Oteng, DBA, ACFBA, ACFWA, and Mercy Edukugho-Aminah, CFWA.

Get Involved

If you are interested in joining this VSG, please email Nell Pepper (nell@ffi.org) before December 20, after which an organizing meeting will take place on January 14, 2025.

PREVIOUS EDITION



Dear Colleagues,

It's hard to believe it's been another year, and we have just concluded another successful and engaging FFI conference, this time at the London Business School. Many thanks to our academic host LBS and to the conference program committee for putting together an incredible program. The Board regrouped after the conference and is eager to work with the Green Associates team to keep advancing the important connections and learning opportunities for our members in the coming months. Here is an update of all that's ahead.

Thanks for being part of our incredibly dynamic, global community.

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