



PREPARED EXCLUSIVELY FOR FFI MEMBERS

# 2025 Pre-Conference Sessions

AUGUST 29, 2025



In this issue of *FFI on Friday*, we are pleased to announce three pre-conference sessions in the afternoon on October 29, 2025, in Boston. Please note that **the pre-conference events are open at no charge to all main conference registrants. However, pre-registration is required.**

Links to register for pre-cons are included in this article. Go [here](#) if you are not yet registered for the main conference. Read on for details.

*These pre-con sessions are concurrent on the afternoon of October 29. Please register for one ONLY.*

## PRE-CONFERENCE 1

### **Beyond Competition: Toward a Culture of Collaboration in Family Business Advisory at the Marriott Long Wharf, 1:30-4:30PM**

**Facilitators: Andrew Keyt and Joe Astrachan, *Generation6***



**Andrew Keyt**

FFI Fellow



**Joe Astrachan**

FFI Fellow

As advisors to enterprising families, we share a common mission: to serve with integrity, empathy, and excellence. Yet our field can at times feel fragmented marked by competition, siloed expertise, and quiet skepticism about one another's work. What would it take to shift from a culture of competition to one of collaboration?

In this interactive pre-conference session, we will explore the opportunities and challenges of building trust and mutual respect within the advisory community. Through guided reflection, structured peer dialogue, and small group exercises, we will examine:

- The reality of demand: Why the field is not a zero-sum game
- Knowing when we're not the best fit—and how to refer responsibly
- The value of understanding one another's unique value propositions
- A vision for a shared code of conduct among practitioners

Some may call this idealistic, but for us, it's about imagining what is possible when we move from parallel paths to a shared purpose, and a stronger, more connected field.

[REGISTER HERE](#) — LIMITED TO 60 REGISTRANTS

## PRE-CONFERENCE 2

**Wealth Beyond Measure Workshop at Alliance Bernstein, 53 State Street,  
Exchange Place Boston, 2:00–4:00PM**

**Presenters: Anne Bucciarelli, *Bernstein Private Wealth Management*, and  
Patricia Angus, *Angus Advisory Group***



**Anne Bucciarelli**  
ACFBA/ACFWA



**Patricia Angus**  
FFI Fellow  
FFI Board of  
Directors

Join us for an exclusive workshop which delves into the intricate world of family, wealth, and purpose. The workshop discussion will feature Anne Bucciarelli, the author of Bernstein Private Wealth's latest research report *Wealth Beyond Measure*, which includes insights gained from deep, one-on-one interviews with 40 UHNW Bernstein families, including their experiences on preparing rising generations, managing family business dynamics, decision-making around family offices, and honing purpose and impact. This research will be paired with practitioner insights from Patricia Angus, who will pull from three decades of experience in wealth management, on the changing perceptions of wealth, wealth beyond the family business, evolving business models, and generational shifts. Engage in facilitated discussions, gain practitioner perspectives, and look ahead to the future of wealth management in a changing world.

[REGISTER HERE](#) — LIMITED TO 40 REGISTRANTS

## PRE-CONFERENCE 3

### How Sweet It is: Iconic New England Family Businesses at Suffolk University School of Law, 73 Tremont Street, 2:00-4:30PM



**Bob Rook**



**Susan Mara  
Bregman**



**Christopher Gibson**



**Patricia Annino**  
FFI Fellow

Looking for sweets in Boston? Join this pre-con for mouthwatering treats, a complimentary book, and a unique educational experience. Indulge your sweet tooth and register for this pre-con with iconic multi-generational businesses from New England.

**Panelists:**

- Bob Rook: Founder of Emack & Bolio's, Suffolk University Law School alum
- Eric Lampman: President of Lake Champlain Chocolates
- Susan Mara Bregman: photographer, historian, and author of *New England Sweets: Doughnuts, Bonbons and Whoopie Pies*

**Moderator:**

- Christopher Gibson, professor of law at Suffolk University Law School

**Host:**

- Patricia Annino, FFI Fellow and Suffolk University Law School alum

[REGISTER HERE — LIMITED TO 30 REGISTRANTS](#)

**REGISTER AT THE SUMMER RATE FOR THE  
2025 GLOBAL CONFERENCE**



Register for the Global Conference before September 16 to lock in the summer rate.

EXPLORE THE CONFERENCE PROGRAM AND REGISTER

## PREVIOUS EDITION



In this issue of *FFI on Friday*, we are pleased to announce the main conference keynotes for the October 29-31 Global Conference in Boston. The opening keynote on Wednesday night will feature Rob Nail, followed by Thursday keynote Christopher Gibson, who will speak after lunch. Closing the 2025 conference will be a panel of media experts, with Karen Dillon, editorial director of BanyanGlobal.

In between? Two days of educational sessions and networking. Read on for details and [register here](#) before the summer conference registration rate ends.

READ MORE



## DATES TO REMEMBER

SEP  
5

**Notice of 2025 FFI Board Ballot**  
Details to Follow

SEP  
16

**Registration Deadline for the 2025 Global Conference at the Summer Rate**  
[LEARN MORE AND REGISTER](#)

SEP  
29

**Deadline to Reserve a Room at the Marriott Long Wharf at the Conference Rate**  
[HOTEL RESERVATIONS](#)

OCT  
29-31

**2025 FFI Global Conference**  
[LEARN MORE AND REGISTER](#)

NOV  
10

**FFI Annual Meeting**  
Details to Follow