



PREPARED EXCLUSIVELY FOR FFI MEMBERS

Celebrating FFI Organizational Members: Part V

MAY 23, 2025



Today we continue our 2025 series featuring FFI organizational members. These issues highlight the contributions of distinguished associations, educational institutions, and professional organizations from across the globe.

In this edition, we feature five more exceptional organizations that are increasing the global footprint of the field and sharing their invaluable knowledge with the FFI community. Discover how these members are shaping the future of the field and enriching the wider FFI network. Stay connected as we spotlight more organizational members in upcoming issues!

ASSOCIATION

FAMILY BUSINESS ASSOCIATION



Family Business Association (FBA) helps family businesses in Australia and New Zealand to grow and thrive. They advocate for a sector that plays an integral role in the economy and social fabric, accounting for 70% of all Australian businesses and 50% of the workforce. FBA supports members through education programs, member-only discounts, connections to accredited advisors, and networking opportunities with peers through exclusive events and the Forum Group program.

The FFI members who are in FBA include Lea Boyce, FFI Fellow John Broons, FFI Fellow David Harland, Duane O'Donnell, Robert Powell, FFI Fellow Kirsten Taylor-Martin, Daniel Trimarchi, and Darren White.



Lea Boyce
CFBA



John Broons
FFI Fellow



David Harland
FFI Fellow



Duane O'Donnell
CFBA, ACFWA



Robert Powell
CFBA/CFWA



Kirsten Taylor-Martin
FFI Fellow



Daniel Trimarchi



Darren White
CFBA

EDUCATIONAL ORGANIZATION

ANDERSON UNIVERSITY



The Kim S. Miller Family Enterprise Institute of South Carolina at **Anderson University** fosters learning, sharing, and creative solutions regarding the many critical issues and problems faced by family enterprises. The mission of The Kim S. Miller Family Enterprise Institute of South Carolina is to provide education, networking, support resources and research to help family enterprises and those involved in or serving them maximize their overall health and sustainability.

FFI members are Elizabeth Bagger, Brad Bechtold, Rachel Nafziger, Steven Nail, Richard Ray, and FFI Fellow Ronald C. Reece.



Elizabeth Bagger
CFBA



Brad Bechtold
CFBA/CFWA



Rachel Nafziger



Steven Nail



Richard Ray



Ronald C. Reece
FFI Fellow

PROFESSIONAL ORGANIZATIONS

FORMUE



Formue was established in 2000 and has substantial operations in Sweden, Norway, and Denmark. Formue is an independent advisory office, offering holistic services in financial planning, investment analysis, allocation/market view, succession planning, legal and tax evaluations, accounting, banking evaluations, and in topics related to retirement and insurance.

FFI members include Jan Tore Andresen, Øystein Bø, Alexander Heiberg, Tor Kildal, Janicke Udbye Lovaas, Philip Mitchel, Bjørn Pedersen, Lasse Sabel, Joel Uddenäs, and Helena von der Esch.



Helena von der Esch
FFI Fellow
Board of Directors



Øystein Bø



Alexander Heiberg



Jan Tore Andresen



Tor Kildal



Janicke Udbye Lovaas



Philip Mitchel



Bjørn Pedersen



Lasse Sabel



Joel Uddenäs

MORGAN, LEWIS & BOCKIUS

Morgan Lewis

Morgan Lewis has an interdisciplinary team that has spent their entire career in advising family-owned businesses on transition planning, family and family business governance, and family member liquidity structures (which may include the establishment of an ESOP and family foundation), and ultra-wealthy family business owners in transitioning wealth from one generation to the next along with forming a family office.

FFI members include Chuck Bogle, Dan Carmody, Matthew Chapman, John Kober, Patterson Perrin, and Emily Rickard.



John Kober



Chuck Bogle



Dan Carmody



Matthew Chapman



Patterson Perrin



Emily Rickard

TRIBRIDGE PARTNERS



TriBridge Partners helps protect the assets of its clients by bridging the exposure gaps to create continuity through the expertise of the firm's associates in combination with strategies and solutions. The firm assists its family business clients with continuity planning, multi-generational transitions, and compensation and benefits.

FFI members are Jason Ditto, Heath Hykes, FFI Fellow David M. Morris, John C. Morris, Tacy Roby, Chris Schneider, Sarah Speed, and Paul Younkens.



Jason Ditto



Heath Hykes



David M. Morris
FFI Fellow



John C. Morris



Tacy Roby



Chris Schneider



Sarah Speed



Paul Younkens

FFI ORGANIZATIONAL MEMBERS

FFI's mission is to be the most influential global community of thought leaders in the field of family enterprise. We foster and publish research, offer educational programs, and share knowledge to develop a professional association of multi-generational family enterprise advisors, consultants, and educators.

[VISIT THE ORGANIZATIONAL MEMBERS DIRECTORY FOR COMPLETE LIST](#)

REGISTER FOR THE 2025 GLOBAL CONFERENCE AT THE SPRING RATE



June 21 is the deadline to register for the 2025 Global Conference at the discounted Spring Rate.

[VIEW THE PROGRAM AND REGISTER TODAY](#)

REGISTRATION IS NOW OPEN FOR Q3 GEN CORE AND ADVANCED CERTIFICATE PROGRAMS

Further your professional education with the GEN (Global Education Network) certificate programs in Family Business Advising and Family Wealth Advising.

**[VIEW PROGRAM DESCRIPTIONS, SCHEDULES, FACULTY, AND
REGISTRATION INFORMATION](#)**

PREVIOUS EDITION



We are pleased to offer you an early look at the June 2025 issue of *Family Business Review (FBR)*.

As an FFI member, you enjoy complimentary access to the entire *FBR* article library, with more than thirty years insights and research tailored for the family enterprise community.

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