



PREPARED EXCLUSIVELY FOR FFI MEMBERS

From the Chair

NOVEMBER 21, 2025



Dear Colleagues,

It's hard to believe that it's been another year, and we have just concluded a successful and engaging FFI conference, this time in Boston at the Marriott Long Wharf. Many thanks to our academic host Suffolk University Law School and to the conference program committee for putting together an incredible program. The Board regrouped after the conference and is eager to collaborate with the Green Associates team to keep advancing the important connections and learning opportunities for our members in the coming months as we celebrate the 40th anniversary of FFI in 2026.

Here is an update of all that is ahead.

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

FFI BOARD MEETING RECAP: NOVEMBER 10, 2025

The FFI Board convened immediately following the FFI Annual Meeting on November 10, 2025, kicking off plans for a year full of meaningful opportunities as we celebrate the 40th year of FFI. Stay tuned for a lineup of engaging experiences that span GEN programs, a variety of Virtual Study Groups, and our highly anticipated 2026 conference in New York City next October.

BOARD OFFICERS AND TRANSITIONS

We are pleased to announce the newly elected board officers for 2026.

- **Dan Frosh:** Vice-Chair
- **Helena von der Esch:** Secretary
- **Sandra McNeely:** Treasurer
- **Anthony Macaluso:** Assistant Treasurer

The FFI chair will continue serving through 2027. We also extend heartfelt gratitude to outgoing board members Patricia Angus, Richa Arora, Jeff Cobb, and Sanjay Sharma for their exceptional contributions. Patricia Annino was subsequently elected to fulfill the one-year term for Jeff Cobb.

ANNUAL MEETING HIGHLIGHTS

The November 10 Annual Meeting marked our sixth virtual gathering! Here are some highlights.

SECRETARY'S REPORT

Helena von der Esch, secretary, formally announced the election of Anne Bucciarelli, Deema Dajani, and Matt Knight to the Board of Directors. Their terms will extend from November 10, 2025, to the 2029 Annual Meeting.



Anne Bucciarelli
Bernstein Private
Wealth Management



Deema Dajani
Dubai Centre for
Family Businesses



Matt Knight
University of Alberta

TREASURER'S REPORT

Sandra McNeely presented the Treasurer's Report, which featured audited figures for 2023 and 2024, along with projections for 2025. FFI continues to maintain a strong financial position, with auditors praising the Finance and Audit Committee, comprised of the treasurer and committee members Mary Duke, Anthony Macaluso, and Bilal Zein.

PRESIDENT'S REPORT

Judy Green, FFI President, highlighted key strategic initiatives and provided data on the following:

MEMBERSHIP

- Current membership stands at 1,900+ members across 80 countries.
- 77% of the members are professionals, 20% are educators/researchers, and 3% from a variety of other backgrounds
- Geographic distribution: 52% US and Canada, 23% UK and Europe, 15% Pacific Rim, and 10% in Latin America, Africa, and the Middle East

GEN PROGRAM

The GEN program remains robust, with 100+ students from nearly 35 countries in 2025. Over 130 certificates are projected to be awarded by the year-end. Ten new FFI Fellows were announced at the 2025 conference, bringing the total number of Fellows to 300+. The 2025 GEN faculty members were commended for their dedication.

Since it was inaugurated in 2012, the GEN program has granted 1700+ certificates to individuals from nearly 80 countries across the globe.

2025 CONFERENCE

Dennis Jaffe and Karen Dillon, co-chairs of the 2025 Conference Program Committee, were thanked and applauded for the creativity and diligence in organizing the event, which drew more than 350 attendees from over 35 countries. Highlights included keynotes from Rob Nail of Singularity and Christopher Gibson, professor of law at Suffolk University Law School.



Rob Nail



Christopher Gibson

RESEARCH, PUBLICATIONS, AND PUBLIC AWARENESS

Family Business Review (FBR): FFI's scholarly journal remains strong with a five-year impact factor 8.8 and a ranking of 39 out of 316 business journals, as per the 2024 Clarivate Report. Don Neubaum was thanked for his five years of service as editor of *FBR*, and Evelyn Micelotta was announced as the incoming *FBR* editor as of January 1, 2026.

FFI Practitioner & FFI on Friday: Both publications maintained a strong weekly publishing schedule with diverse content. More than 100 issues were published in 2025 in these two digital publications.

"Asia's Succession Moment: Closing the Planning Gap to Safeguard Legacy" was published in September 2025 as a result of an FFI collaboration with Wealth Management Institute (WMI) in Singapore. The report is available [here](#).



Preliminary plans for 2026 celebration the founding of FFI were announced.

Mark your calendars for October 28-30, 2026, in NYC, for our Annual Global Conference. The 2026 conference program committee is chaired by Patricia Angus, Angus Advisory Group and faculty at Columbia University.



Cordially,

A white, handwritten signature of 'Debbie Bing' on a dark green background.

Debbie Bing

FFI Board Chair

PREVIOUS EDITION



Today's *FFI on Friday* issue continues 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 recognize five more exceptional organizations that are increasing the global footprint of the field and sharing their knowledge with the FFI community. Stay connected as we spotlight more organizational members in upcoming issues!

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