

**PREPARED EXCLUSIVELY
FOR FFI MEMBERS**



MARCH 13, 2026

Thank You to the Q1 Global Education Network (GEN) Faculty



As we approach the end of the first quarter, we extend our sincere appreciation to the dedicated faculty members teaching Q1 courses in the Global Education Network (GEN) program. Their expertise and commitment to advancing the field are at the heart of the world-class learning experience provided to GEN students and graduates. Please join us in thanking them for their outstanding contributions to FFI and the field.

Mariana Martinez

GEN 102: SYSTEMS THINKING FOR THE FAMILY ENTERPRISE ADVISOR

Mariana Martinez, PsyD, is an FFI Fellow dedicated to helping families enhance communication, strengthen culture, prepare for generational transitions, and build governance. As executive director of Family Wealth and Culture Services at Wells Fargo, she has been instrumental in developing and shaping the firm's family dynamics, education, and governance offerings. Her work is grounded in family systems theory, which she studies and researches as faculty at the Bowen Center for the Study of the Family in Washington, DC.



GEN 102 Course Concepts

- Systems thinking and why it is a vital tool in advising family enterprises.
- The key complexities in a family enterprise that benefit from systems thinking.
- How to adopt a systems thinking mindset.
- Genograms as a practical tool for understanding the client system and how this tool can positively influence the work of the professional.
- The role of systems thinking in the growth, development and personal engagement of all family enterprise advisors.

Mairi Mickel

GEN 201: THE ACTION RESEARCH MODEL AS APPLIED TO FAMILY ENTERPRISE ADVISING

Mairi Mickel, FFI Fellow, is founder of the Mickel Practice, a consultancy and coaching business that specializes in transition planning for the owners of SME family businesses and those within their family office across the UK, Europe, and America. Previously a main board director, she continues to be an active owner of her family's 100-year-old construction company, headquartered in Glasgow, Scotland. She also sits as a non-executive director on the board of Triple Crown Sports in Fort Collins, CO.



GEN 201 Course Concepts

- Delivering the nine phases of the consulting process
- Supporting systems thinking and the multi-disciplinary approach
- Applying core theories with the skills and tools required to work effectively with family enterprise clients
- Executing planned change through strategies, implementation, and communication
- Recognizing your own lens, filters, and biases

Rodolfo Paiz

GEN 202: ADVISING THE FAMILY WEALTH SYSTEM: A MULTIDISCIPLINARY APPROACH

Rodolfo Paiz is Founder/CEO of Fidelius, an advisory firm with twenty-five years of guiding complex family systems all across the Americas through the full range of challenges they face—parenting, business strategy, governance, succession, and wealth—often as the senior advisor coordinating their broader team of professionals. An FFI Fellow, the 2022 FFI International Award recipient, and creator of Iceberg Analysis, the Family-Office Services Pyramid, and other tools, he previously served on the FFI board.



GEN 202 Course Concepts

- Understanding the nature and complexities of families of wealth
 - Identifying and exploring management structures used by families of wealth
 - Unique challenges and opportunities encountered by professionals working with families of wealth
 - Multidisciplinary tools needed to work with families of wealth
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Francesco Barbera

GEN 501: EVIDENCE-BASED ADVISING: USING RESEARCH TO EMPOWER FAMILY ENTERPRISES

Francesco Barbera, PhD, FFI Fellow, is an associate professor of entrepreneurship and strategy at The Ted Rogers School of Management at Toronto Metropolitan University. His teaching and research interests encompass a wide range of topics related to family business, entrepreneurship, small business management, and family business education. He is a long-serving member on the review board of the *Family Business Review*, and he received the 2024 Barbara Hollander Award.



GEN 501 Course Concepts

- Helping advisors become a critical user of research
- Creating awareness of the heterogeneity within family firms
- Clarifying the variances in family firms so professionals can avoid applying a “one-size-fits-all” mentality
- Understanding the need for family firm identities
- Identifying what influences a family firm’s economic and non-economic performance
- Helping advisors guide family enterprises in their quest for sustainability

PREVIOUS EDITION



Submissions to the FFI Academic Awards are due in less than a month!

Since 1989, FFI has recognized academic excellence through the [Best Doctoral Dissertation](#) and [Best Unpublished Research Paper](#) awards. These awards recognize outstanding academic research in the study of family firms and their advisors.

The awards are open to academics worldwide—membership in FFI is not required. Please share this opportunity with your colleagues!

[READ PREVIOUS EDITION](#)



DATES TO REMEMBER

March 19

FFI 40th Anniversary Regional Reception in New York

RSVP BY MARCH 16

Open NOW

FFI Academic Award Applications

APPLY BY APRIL 1

Open NOW

Applications for FFI GEN Scholarships

APPLY BY MAY 1

Open NOW

FFI Achievement Award Nominations

SUBMIT BY MAY 1