

**PREPARED EXCLUSIVELY
FOR FFI MEMBERS**



MARCH 27, 2026

From the Chair



In this week's issue we are pleased to bring you an update from FFI board chair Debbie Bing, following the FFI board retreat last week in New York.

Dear Colleagues,

It was a pleasure to chair the March 20–21 FFI board retreat in New York City at the Marriott Marquis. Board members attending were Dan Frosh, vice–chair; Helena von der Esch, secretary; Sandra McNeely, treasurer; Anthony Macaluso, assistant treasurer; Patricia Annino; Anne Bucciarelli; Jeremy Cheng; Nicholas Jacob; Rania Labaki; Panikkos Poutziouris; and Bilal Zein. Also attending were legal counsel Michael Connolly; Tom Cahill, financial advisor; Judy Green, FFI president; and Brigett Owens, GEN and conference coordinator. Evelyn Micelotta, *FBR* editor, was present on Friday afternoon.



The retreat was preceded on Thursday by a meeting of the 2026 conference program committee and a regional reception for FFI members and friends in the New York area.

The Retreat

The board retreat began officially on Friday afternoon and focused on a three–year review of the FFI strategic pillars of Education, Research, and Public Awareness, including related financial data as well as board member expectations.

General discussions were held on the expectations and strategies for the next 3–5 years as FFI celebrates its 40th anniversary in 2026. Below are a few highlights of our work:

- Identifying and celebrating accomplishments of FFI as it celebrates its 40th year
- Discussing strategic goals for the next 3–5 years, including how to sustain, amplify and add to the elements of FFI that advance our mission of being the most influential global community of thought leaders in the field of family enterprise
- Exploring strategies for building a strong economic foundation to support FFI’s sustainability and continued evolution
- Our role as Board members to support and steward the organization in its next chapter

Upcoming Conferences

The October 28–30, 2026, conference at the Marriott was reviewed. Details and program for this conference will be released in early April. The 2027 conference will be held in London and the 2028 conference in Boston.



Nominating Committee

Rania Labaki, chair of the 2026 Board Nominating Committee, led a discussion reviewing expectations for current and future board members, as well as how the board composition reflects the strategic initiatives of FFI. An invitation will go out to the membership in an upcoming issue of *FFI on Friday* with more details from the Nominating Committee, including a form for submitting names for consideration as future board members.

Business Meeting

On Saturday afternoon, a business meeting was held to complete the 2026 board retreat. The meeting adjourned late Saturday afternoon, and all agreed that it is a pleasure and an honor to be in leadership roles for this extraordinary organization amid a time of such growth and opportunity. If you have not already made a donation to the 40th anniversary fundraising campaign for patient capital, please go here and join your colleagues in this important initiative to raise patient capital in the anniversary year. As of December 31, 2025, more that \$200,000 had be given in outright gifts and pledges.

I'm looking forward to connecting with many of you in the coming months through the exciting opportunities planned during the anniversary year in 2026.



Cordially,

Debbie Bing, chair

PREVIOUS EDITION



As most of our members and readers know, 2026 is the 40th anniversary of the founding of FFI. A milestone in so many ways, it will be celebrated in our GEN program, *FFI on Friday*, *FFI Practitioner*, and regional meetings, all culminating in the annual Global Conference in New York City in October.

In this issue, we bring you some thoughts on original ideas, some reflections from one of the founders of FFI, and...

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DATES TO REMEMBER

April 1

FFI Academic Award Applications

[APPLY BY APRIL 1](#)

May 1

Applications for FFI GEN Scholarships

[APPLY BY MAY 1](#)

May 1

FFI Achievement Award Nominations

[SUBMIT BY MAY 1](#)

May 30

Enrollment Deadline for Q2 2026 GEN Certificate Programs

[ENROLL BY MAY 30](#)

June 2

Regional Reception in Boston

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