FFI Virtual Conference: Professional Development Opportunities

WEEKLY EDITION • AUGUST 11, 2021

From *FFI Practitioner*

We know that for many people attending the conference in London at the end of October is either difficult or impossible. But *FFI Practitioner* and FFI itself are committed to the ongoing professional development of our readers—members and non-members. In this issue we describe the sessions that will be held virtually on October 18 and 19. Registrations can be made for any one or all three of these segments, so please review and register for the sessions that contribute to your ongoing professional education.

Monday, October 18, 8:00-11:30AM ET

Benjamin Firmenich
Firmenich, Impact Finance

James Olan Hutcheson
REGENERATIO
N

David King
Triple Crown Sports

Keri King
Triple Crown Sports

Grace Lordan
London School of Economics and Political Science

Mairi Mickel
Mairi Mickel's Business Families

Kelly Salberg
College Sports Evaluation

Pramodita Sharma
University of Vermont

Sanjay Sharma
University of Vermont

Marta Widz
IMD Global Family Business Center

How Engaging Multiple Perspectives (and Pursuits) Can Shape the Future Value of a Family Enterprise

Presenters: David King, Keri King, Mairi Mickel, and Kelly Salberg
This live case study interview (facilitated by an independent director) features four intergenerational family members, telling the story of the King Family's Double vision. The family's multiple but collective goals, addressed openly, led first to a successful ownership/ leadership transition and then to an exciting high growth, family led new business.

Perpetuating the Family's DNA of Sustainability and Resilience: Next Generation's Impact Investing

Presenters: Benjamin Firmenich and Marta Widz
This session illustrates how sustainability and resilience are intertwined and manifest themselves in impact investing; why and how they can become bridges between generations. Furthermore, it will provide the advisors with the toolbox for building the advisory practice in the field of sustainability, resilience, and impact investing for family businesses.

Think Big, Take Small Steps and Help Your Clients Build the Future They Want

Presenters: James Olan Hutcheson and Grace Lordan
Jim Hutcheson will interview Dr. Grace Lordan on steps family businesses should be taking now to future proof their employees. The session will cover goal setting, planning, cognitive biases and resilience. People who attend this talk can expect to learn about the future of work, and also the actions they can take to ensure the future they want.

Embedding Sustainability in Family Business: The Role of the Family Business Advisor

Presenters: Pramodita Sharma and Sanjay Sharma
Authors of *Pioneering Business Families Sustainable Development Strategies* discuss the sustainable development strategies of business families with a purpose successfully using their enterprise as a force of good. In turn, each family reaps the benefits of high economic returns, engaged work force, while positively impacting their community and environment.

Monday, October 18, 12:30-4:00PM ET

Richa Arora
KPMG

Ashley Blanchard
Lansberg·Gersick & Associates

John Davis
Cambridge Family Enterprise Group
Massachusetts Institute of Technology

Stavros Demetriou
KPMG

Megan Helzner
CFAR

William J. Kambas
Withers Bergman LLP

Ivan Lansberg
Lansberg·Gersick & Associates

Linda Mack
Mack International

Rose McNeely
Meritex Company

Keith Michaelson
The Lovins Group

Don Opatrny
The Lovins Group

Natasha Pearl
Aston Pearl

Todd Smith
CFAR

Reimagining The Family Enterprise of the Future: Embracing the Cognitive Era

Presenters: Richa Arora and Stavros Demetriou
This session will discuss the emerging opportunities and unique challenges relating to the future of work by showcasing how family enterprises will work will evolve, emerge and engage. We will review key macro trends and build an understanding of the critical diverse skills of the future.

Working with Families on Values, Purpose and Wealth Utilization

Presenters: Ashley Blanchard and Ivan Lansberg
We believe that helping families reflect on how best to utilize their wealth is a key part of continuity planning. This session will focus on ways that advisors can help clients have constructive intergenerational and inter-branch dialogue on family values, purpose, and legacy.

Every Sustainable Family Enterprise Needs a Perimeter Fence

Presenters: William J. Kambas, Linda Mack, and Natasha Pearl
This presentation will offer multi-disciplinary insight into family enterprise sustainability. The presenters are family enterprise advisors with expertise in tax law and entity structure, human capital, and wealth preservation infrastructure. The Sustainable Family Enterprise Ecosystem and its "Perimeter Fence" ensure coordination, mitigate risk, and promote growth.

Teaching a Family to Fish: The Annual Family Meeting as a Learning Opportunity

Presenters: Megan Helzner, Rose McNeely, and Todd Smith
Teaching clients "to fish" should be our goal and maintaining self-awareness in our role as advisors is critical. Through a case discussion with a next generation family member, we will explore how to use an annual family me.

Family Wealth as an Engine for Personal Thriving and Societal Evolution

Presenters: Keith Michaelson and Don Opatrny
The presenters will share tools that helped clients find personal vitality, purpose, and new ways to create resiliency in their families over the past year. The workshop will provide a space to harness the collective wisdom of participants to leverage these successes and contribute to the evolution of our field.

Surviving the Turbulent 2020s as a Family Enterprise

Presenters: John Davis
The future is here, and it is a VUCA world – volatile, uncertain, complex, and ambiguous. This decade of the 2020s will be turbulent and fast-moving. The owners of family enterprises who understand that the game has changed, and how to adapt to it, will survive and prosper. Those who don't will be swept away. This session draws on extensive research from the latest study of the Cambridge Institute for Family Enterprise. It examines the forces and trends that are changing the landscape for family enterprises and offers a set of mindsets and practices for family enterprises to succeed in the turbulent '20s.

Tuesday, October 19, 8:00-11:00AM ET (Limited to 25 enrollees)

Rania Labaki
EDHEC Business School

Christopher Robichaud
Lansberg·Gersick & Associates

Wendy Ulaszek
Lansberg·Gersick & Associates

Managing Ethical Dilemmas in Family Business

Presenters: Rania Labaki, Christopher Robichaud, and Wendy Ulaszek
Ethical dilemmas in a family business prove to be more complex that in other types of organizations, as they often lie at the intersection of the family and the business. These dilemmas are sometimes ignored, understated, or mismanaged by both family members and advisors, for different reasons whether related to financial and political stakes or emotional and cognitive biases. They may lead to serious consequences on the longer run, such as disruptive relationships or estrangement in the family, dysfunctional behavior of family members, and business inefficiencies, underperformance, and threats to the family ownership control. This educational session is intended for educational support to family business advisors to prevent and address the ethical dilemmas in a thoughtful way towards ensuring the continuity of both the business and the family.

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