

CERTIFICATE AWARDS BREAKFAST

Thursday, October 24, 2019 | 7:30 AM to 8:45 AM

Grand Ballroom Salon E/F

Master of Ceremonies: Carlo Salvato, GEN Faculty chair

Sponsored by FFI Board of Directors

7:00AM

BREAKFAST AND PHOTOS

7:30AM

PROGRAM BEGINS
WELCOME REMARKS, CARLO SALVATO

2019 FFI GEN SCHOLARSHIP AWARD PRESENTATION

CRYSTAL, ALLIANT PRIVATE
CLIENT SCHOLARSHIP WINNER



LUCIANA LUCENA DE LIMA

Luciana Lucena de Lima comes from a family business in Brazil and is a global senior advisor with more than 15 years of experience advising ultra-high-net-worth families. She is a PhD researcher at the St. Gallen University and a Research Fellow at the ESADE University.



DE VISSCHER & CO
SCHOLARSHIP



MITA DIXIT

Mita Dixit is a co-founder, director, and a family business advisor at Equations Advisors Private Limited, India. She is a researcher, academician, case writer, as well as an advisor with expertise in guiding business-owning families on family governance, next-gen transition, conflict management, and succession planning.



2019 FFI GEN SCHOLARSHIP AWARD PRESENTATION

WAESCHE FAMILY SCHOLARSHIP

SHILPA MIRCHANDANI

Shilpa Mirchandani serves as the Senior Wealth Planner for the Wealth Planning Group at City National Bank in Beverly Hills. Shilpa provides comprehensive wealth planning services to families, taking into consideration their values, goals, family history, and dynamics.



FITZPATRICK & FRANCIS FAMILY BUSINESS CONTINUITY FOUNDATION ADVANCED CERTIFICATE SCHOLARSHIP



ELAINE KING

Elaine King, CFBA, ACFBA, is a professional with expertise in international family financial planning. The founder of Family and Money Matters™, she is a Florida Supreme Court Family Mediator and a Certified Coach from the University of Miami (ICF). Elaine serves on the advisory board of Asociación de Empresas Familiares (AEF) and The Estate Planning Council (EPC), among other organizations. She received her CFBA from FFI in 2015.



ALTOUQ GROUP ADVANCED CERTIFICATE SCHOLARSHIP



ALTOUQ الطوق

ESTHER KONG

Esther Kong, CFBA, ACFBA is the deputy director of the Business Families Institute @ Singapore Management University (BFI@SMU). She is also an executive committee member of the FFI Asian Circle Virtual Study Group. She completed the CFBA program in 2016.



PRESENTATION OF 2019 FFI GEN CERTIFICATES

CERTIFICATE IN FAMILY BUSINESS ADVISING RECIPIENTS

JAIKRISHNA B.
BEATRICE BOZA
ALEJANDRO CERON
PAUL DEDORA
TADEUSZ DULIAN
JAY FELDMAN
SETINA FORSYTH
AMY HART CLYNE
JUDITH VAN HELVERT

CERTIFICATE IN FAMILY WEALTH ADVISING RECIPIENTS

MICHAEL BLACKSBURG
KAREN CARLSON
JAMES COUTRE
RONNA J. GYLLENHAAL
OLIVIER RIEU

DUAL CERTIFICATES IN FAMILY BUSINESS AND FAMILY WEALTH ADVISING RECIPIENTS

ALFONSO BAIGORRI
CALVIN CHAN
JOY CHUFEN CHEN
JESSICA J. GARNER
AIK-PING NG
ASIN NURANI
CHRISTINA STAPLES
LYDIA TUTHILL

ADVANCED CERTIFICATE IN FAMILY BUSINESS ADVISING RECIPIENTS

ANDREA BAARS
ROXANA BOS-SCHEPERS
ALEJANDRO CERON
JUAN PABLO CERON
CALVIN CHAN
MARTINE DESCHAMPS
TADEUSZ DULIAN
MADELINE S. HOGE
DAVID M. KAROFKY
ELAINE KING
ESTHER KONG
DANIEL LORENZO
ANTHONY D. MACALUSO
JOHN E. NEFF
BRIAN K. STAFFORD
SHELLEY M. TAYLOR
EVA WATHEN

PRESENTATION OF 2019 FFI GEN CERTIFICATES (CONTINUED)

**ADVANCED CERTIFICATE IN
FAMILY WEALTH ADVISING
RECIPIENT**

**MARIA JOSE CERON DE LA TORRE
KAREN CARLSON
JESSICA J. GARNER
RONNA J. GYLLENHAAL
MARIANA MARTINEZ**

**DUAL ADVANCED CERTIFICATES
IN FAMILY BUSINESS AND
FAMILY WEALTH ADVISING
RECIPIENT**

HONORA DUCATILLON

PRESENTATION OF 2019 FFI FELLOWS

FELLOWS

**JEREMY CHENG
RONNA J. GYLLENHAAL
DAVID M. KAROFKY
DANIEL LORENZO
ANTHONY D. MACALUSO
ROCHELLE MENDELSON
JOHN E. NEFF
DENNIS PASSIS
BRIAN K. STAFFORD
SHELLEY M. TAYLOR**

CONGRATULATIONS TO THE CLASS OF 2019!