



FFI | Global Conference
Chicago 2017

FAMILY ENTERPRISE
ELECTRIFYING

Session Descriptions

Wednesday, October 25, 2017 9:00 AM – 4:00 PM

Pre-conference seminars

9:00 AM – 4:00 PM

GEN 503 Tools for Positive Change in Family Business Systems: Analysis and application

This course for advanced practitioners will review key forces at work in family business systems, providing an overview of frameworks for capturing and analyzing critical information. Tools and techniques for achieving meaningful change with clients will be applied to selected case exercises. Developing skill for critical analysis will underpin all elements of the day.

Andrew Hier, *Cambridge Advisors to Family Enterprise*; Lloyd Steier, *University of Alberta*

Room: **Boulevard A**

GEN 504 Meaning and Purpose: Philanthropy and the Family Enterprise

This course delivers:

- An awareness of current trends in philanthropy and how wealthy individuals and families engage in philanthropy today — including the emergent field of Impact Investing
- An understanding of how today's high and ultra-high net worth families are expressing their values and working towards social and environmental impact through their philanthropic giving
- Practical approaches, both relevant and rigorous, to position philanthropy at the heart of conversations on values, succession planning and preparing the next generation
- An understanding of how to discuss philanthropy with clients to deepen relationships and win more business
- Opportunities for debate, case studies and reflective exercises to enhance learning and enjoyment

James Coutre, *Fidelity Family Office Services*; Etienne Eichenberger, *WISE*; Maya Prahbu, *Coutts & Co.*

Room: **Boulevard C**

Thursday, October 26, 2017

7:00–8:15 AM

Smart Start Sessions

⚡ Generational Wealth Transfer: Succession planning with a permanent capital investment partner

Hear a discussion on liquidity options and succession planning for business owners.

Todd Lancioni, Jessica Clemence, *JZ Partners*

Room: **Williford B**

Host: Nancy Drozdow

⚡ How Can a Digital Communication Platform Benefit You and Your Multigenerational Client Families?

Learn how you can revolutionize your client communications, and enhance your client families' overall engagement and alignment via a digital communication platform.

Elvira Orza, *Trusted Family*

Room: Williford A

Host: Paul Karofsky

⚡ How to “Jump Start” a Family: The family office

A family office is not wealth management: it's one of the most valuable (but most misunderstood) tools in the search for simultaneous success and harmony. We'll explore the best ways to “jump start” our families' well-being with family-office services, considering differences and challenges in their size, wealth, location, and needs.

Rodolfo Paiz, *55 Fidelius Family Office*

Room: Boulevard C

Host: Grégoire Imfeld

⚡ Personal and Cyber Security: Protecting yourself and your client families in the digital age

The safety and security of your family are the most important thing in the world to most of you. This forty minute discussion will identify the threats, and give you real, practical methods to make your home, family, and cyber-world safer and more.

Joe Clark, *Aon*; William J. Kowalski, *Rehmann Corporate Investigative Services*

Room: Boulevard A

Host: Bob Chernow

8:30–10:00 AM **IDEA LABS**

⚡ Competition within the Sibling Group in an 18th Generation Family Business: Bowen Family Systems considerations

This live-case session, based on an 18th generation business family founded in Europe 460 years ago, will use Bowen Family Systems Theory to analyze, describe and explain how multigenerational emotional patterns are established. Topics to be explored include: how these patterns have impacted leadership styles and sibling relationships, specifically competition among siblings.

Carmen Lence, *Grupo Leche Rio S.A.*; Borja Raventos, *Codorniu Raventos*

Room: Williford B

Host: Kristi Daeda

⚡ Dangerous Short Circuit: Family offices, cyber security, big data and more

More and more family offices (both single and multi-family) are being set up and used by entrepreneurial families globally. With an increasing amount of family wealth being managed outside the traditional banking sector, significant security issues arise. A more volatile global market environment requires family offices to set up the right risk management and technology platform, while digitalization and big data increase the need for superior cyber security measures. This session will provide an understanding of current threat picture, current cyber challenges and areas of greatest focus relative to where family offices are now driving cyber changes.

Peter Brock, JB Rambaud, *Ernst & Young*

Room: Boulevard C

Host: Michael Connolly

⚡ **Disabling Family Hot Buttons: Mediating conflict over intergenerational transfers of family wealth, property and enterprise**

Mediation, a confidential process managed by an impartial professional, can help resolve conflicts in this complex, emotional area. Emphasizing open discussion, the presenters will offer practical tools for use by lawyers, financial advisors, fiduciaries and other professionals to help clients make difficult decisions and develop new approaches to protracted conflict.

Roselyn L. Friedman, *Roselyn Friedman Mediation Services*; John Wofford, *mediator*

Room: Boulevard B

Host: Warren Baker

⚡ **Re-Wire Your Thinking on Leaders in Transition: Stages of adult development and implications for family business succession**

Would you like a new conduit for understanding leaders' realities when they contemplate family business succession? This session explores the five stages of adult development, how each stage impacts a leader's reaction to succession, and tools to customize to help leaders achieve their goals.

Cathy Carroll, *Legacy Onward, Inc.*; Margaret Wilson, *Tandem Partners*

Room: Williford C

Host: Carlo Salvato

⚡ **Western Approaches and Tools in Eastern Advisory Practices: Spark, short circuit, or hybrid grid?**

Panelists from different Pacific Rim countries will reflect on how Western approaches and tools are applied in Asia and what lessons they learned. Participants from the West can partake in a reframing process, analyzing Asian families through a glocalised lens.

Jeremy Cheng, *Hong Kong University of Science and Technology*; Yirhan Sim, *Medion Farma Jaya*;

Kazuyoshi Takei, *WellSpring Family Services*; Pilar Unidad-Tolentino, *Ato Family Business Development Center*

Room: Williford A

Host: Dennis Passis

10:30–Noon **IDEA LABS**

⚡ **Advisor Bias: Exploring the truth of partiality**

Bias exists in everything we do and drives choices we make each day. This session examines advisor bias to raise awareness of its prevalence and explore ways of managing its impact. The underlying assumption is that understanding and resolving unconscious bias provides more effective continuity advice to clients.

Judi Cunningham, *Kennesaw State University*; Wendy Sage-Hayward, *The Family Business Consulting Group*

Room: Boulevard A

Host: Anna Nichols

⚡ **Family-Owned Businesses in Trusts: An in-depth look at some of the electric tensions**

The inherent tension between the risks associated with operating a business, the fiduciary nature of a trust, and the psychology of the ownership of the trust beneficiaries can be a cause of conflict, dissatisfaction, and litigation. When properly managed it can be a source of empowerment. This session will discuss innovative best practice strategies.

Patricia Annino, *Rimôn, P.C.*; Andrew Hier, *Cambridge Advisors to Family Enterprise*

Room: Williford A

Host: Michael Whitty

⚡ **Knowledge Conductors: Education forums for the family business**

As part of the client engagement, some type of informal education may be embedded to help families and other stakeholders grasp different concepts and ideas. Due to the intimacy of family businesses, ensuring a safe space for co-learners to speak openly must be evident for the work to be successful. This panel will explore the forms of education most suitable in the family business system and share experiences from implementing training for the organizations they serve.

Jared Byas, *Delaware Valley Family Business Center*; Alleah Heise, Luke Simmering, *Legasus Group*

Room: Williford B

Host: Anthony Devine

⚡ **Next Gen Business Models: How family enterprise must transform in the new economy**

Dynamics of competition are changing. New companies, business models and technologies will emerge and disrupt every industry and pose threats as well as opportunities for family-owned businesses. This session presents three options in the face of change; get ahead, adapt or fall behind.

Salvador Ceró, Juan Pablo Cerón, Maria José Cerón, *STF Consulting Group*

Room: Williford C

Host: Patricia Angus

⚡ **Power Generation: Creating a hum in the next generation — rather than a ho-hum**

Family businesses have an often discussed but under-practiced opportunity to plug into the spirit of innovation that lives within its family members. Through video case studies, this session explores practical ways that entrepreneurship and innovation can add to relationships among family members and the economics of the business.

Katelyn Husereau, *CFAR*

Room: Boulevard C

Host: Mairi Mickel

1:30-2:45PM SNAP LEARNING

CONVERSATIONS Prudence Gourguechon, *Invantage Advising*, facilitator

Room: Boulevard C

⚡ **Alternating Current: Using neuroscience (C-IQ) in the consulting process**

Explore the epigenetics of conversation, the habitual patterns people become entrenched in, and move to behaviors that prime the brain for trust, partnership and mutual success. Learn how these patterns play out in advisors and family-owned businesses. C-IQ could be considered the step above EQ.

Natalie McVeigh, *Wells Fargo Private Bank*

⚡ **Direct Current: Getting everybody on the same page**

Learn about an open-source tool to use with client families to get everybody on the same page. It helps the family clarify the picture of the family, business and ownership, both today and in the future, which, in turn, helps plan and coordinate the way forward and the work of other advisors.

Steve Legler, *TSI Heritage*

DISRUPTION Sylvie Huard, *Harmonie Intervention*, facilitator

Room: Williford B

⚡ **Disruption Channeling the Future Family Enterprise**

Take a new look at disruptive and innovative trends as diverse as Blockchain and Millennial mindsets for reshaping the way one does business. Learn more about these trends, how to spot them, and what to do next — regardless of which hat in the family realm your clients wear!

Asher Noor, *AITouq Group*

⚡ **Disruption in the Family Business: The squandered trust advantage**

The 2017 Edelman TRUST BAROMETER Special Report on Family Business reveals that family business is the most trusted form of business globally. However, only one in two people know which companies are family owned, resulting in a squandered trust advantage. Additionally, family business is not recognized for the attributes on which they pride themselves: job creation, philanthropic engagement, long-term orientation and innovation; and the next generation of family business leaders are incredibly mistrusted. This presentation will discuss how to overcome these possible disruptions to the family enterprise.

Isys Caffey, *Edelman*

PHILANTHROPY AND GLOBALIZATION Lenka Beinhoff, *Beinhoff & Co., facilitator*

Room: Williford A

⚡ **Amp Up Your International Giving**

What are the trends in international giving? What works well, what doesn't? What are the rules? Learn more about tools that help families work together and make a dent on global issues — including the biggest humanitarian crises of our time.

Suzanne Hammer, *Hammer & Associates*

⚡ **Sparking New Knowledge: Globalization and family firms**

What are the electrifying practices that help family firms deal with globalization on both family and business fronts? Learn more about Cambridge Institute's latest research on how advisors can rewire to support their clients? Join this conversation sparking discussion on turning globalization into a source of energy to benefit enterprising families.

Rebecca Chung, *Cambridge Institute for Family Enterprise*

RISK Elle Hansen, *REGENERATION, facilitator*

Room: Boulevard A

⚡ **Preventing Sparks and Blackouts: Planning for the unexpected**

Shock-proof your clients! Nearly every family faces challenges that could derail their plans or destroy their family, and for which they failed to plan an effective strategy. Increase your ability to detect those risks proactively and help your clients either prevent or mitigate their impact more effectively.

Rodolfo Paiz, *55 Fidelius Family Office*

⚡ **Understanding Family Enterprise Risks: Shining a light on five best practices to avoid short circuits**

There's a scarcity of information available to help family enterprises gain insight into risk management strategies employed by their peers. This session will help participants understand the complexity of family enterprise risk and review five best practice areas.

Linda Bourn, *Crystal & Company*

WEALTH Dennis Jaffe, *facilitator*

Room: Williford C

⚡ **The Inescapable Influence of Money on the Family Enterprise**

Explore the individual family enterprise member's relationship with, and understanding of, money. Join a discussion that focuses on the need for a family business to educate members on money's influence on the success and sustainability of the enterprise.

Randy Waesche, *Resource Management, LLC*

⚡ **The Live Wire of Wealthism**

Join a discussion on the range of assumptions people hold about accumulated family wealth. Participate in creative exercises to identify and process your own biases — and develop new strategies to help other professionals and clients do the same with these challenging wealth stereotypes.

Kristen Heaney, *Legacy Capitals*; Jeff Savlov, *Blum & Savlov — Family Business Consulting*

⚡ **Due Diligence Best Practices and Costly Mistakes to Avoid: What families and their advisors need to know about direct investing**

There is now a growing trend among families of reallocating monies away from hedge and private equity funds into direct deals. While there is tremendous opportunity in direct investments, there are also significant pitfalls. This presentation will provide insight into sourcing and vetting private companies for investment.

Jason Abbott, Bill Clogg, Mark Rubin, *FTI Consulting*

Room: Boulevard A

Host: Catherine Roszbach

⚡ **Ending Short Circuits in Creating Next GEN Entrepreneurs: Helping successful families develop new leaders**

This interactive, fun master class will energize each attendee with new, practical ideas of how enterprising families develop entrepreneurs across generations and how advisors can help their clients implement appropriate actions. Educational workshop and programming ideas that can be used with clients and students will be addressed and generated.

Allan Cohen, *Babson College*; Maya Prabhu, *Coutts & Co.*; Pramodita Sharma, *University of Vermont*

Room: Williford C

Host: Lloyd Steier

⚡ **Flipping the Switch of the Intellect: Bowen Theory and family emotional functioning**

Emotions and relationship patterns often make rather easy decisions difficult. This presentation will address what keeps families stuck and what consultants can do to facilitate movement. A 15-minute interview will illustrate the efforts of a brother and a sister as they make decisions around their mother and her estate.

Mariana Martinez, *Bethesda Family Therapy*; Robert J. Noone, *Center for Family Consultation*

Room: Boulevard C

Host: Richard Boyce

⚡ **The Far Horizon: How family businesses are leading the transition to sustainability**

Sustainability is achieved by meeting the needs of the present without compromising the ability of future generations to meet their own needs. Using case examples and reflective exercises, the presenters will explore sustainability within family-controlled companies and discuss how to incorporate sustainability into strategic planning, governance, philanthropy and organizational design.

Don Carlson, Devin DeCiantis, Neus Feliu, Wendy Ulaszek, *Lansberg, Gersick & Associates*

Room: Williford A

Host: David Harvey

Friday, October 27

⚡ **IberoAmerican Study Group (starts at 8:00 AM)** **Innovación, Descubrimientos y Nuevos Conceptos**

El Virtual Study Group Iberoamérica los invita a una serie de ponencias en español sobre los últimos temas en materia de consultoría, investigación y desarrollo de ideas sobre las empresas familiares en España y Latinoamérica. Acompáñanos a descubrir la electrificante emoción de los nuevos conceptos y el lado brillante de los especialistas y profesionales que compartirán sus luces con los asistentes.

Ana Aguirregabiria, *DoctorAna Solutions*; Pablo Aure, *Exaudi Family Business Consulting*; Javier Macías; Rodolfo Paiz, *55 Fidelius Family Office*; Guillermo Salazar, *Exaudi Family Business Consulting*

Room: Williford A

Co-Hosts: Javier Macias, Guillermo Salazar

⚡ **A Family Business on the Moon: 30 power tools to spark family businesses into action**

The majority of family businesses around the world are not aware of, or have no access to, quality education or professional advisory services. Family businesses generate 70%-90% of global GDP, but unfortunately, few engage professional education and consulting. One reason for this is that business families do not appreciate how parallel strategic planning for the family and business can protect family relationships and improve business results. This master class provides a stimulating dialogue and 30 power tools for the “family business on the moon.”

Randel Carlock, *INSEAD*

Room: Williford B

Host: Daniel Bayston

⚡ **The Spark: Mistake motivated learning**

Edison made 1,800 mistakes before successfully inventing the light bulb. Columbus was looking for India. We all make mistakes; it is what we do with the experience that makes a world of difference. This session provides the opportunity for practitioners to approach their mistakes as a tool for innovation and growth.

Kathy Wiseman, *Working Systems*

Room: Williford C

Host: Helena von der Esch

10:45–12:15PM **IDEA LABS**

⚡ **Electric Shocks from the Past: How inter-generational emotions shape family business behavior**

Negative emotions sometimes hit us like an electric shock. The presenters explain how the past can trigger collective shocks in family businesses and shape their behavior. Drawing on their research conducted with family business members, they will suggest a framework for diagnosis of the electric emotional shocks and their consequences.

Fabian Bernhard, Rania Labaki, *EDHEC Family Business Center*

Room: Boulevard B

Host: Elizabeth Bagger

⚡ **ESG Investing: Energizing succeeding generations**

A new wave of philanthropic entrepreneurs and social investors are transforming their family enterprises and society by revolutionizing the impact investing landscape, or ESG (environmental, social, governance), to be more inclusive, more diverse, and more energized. Their intent is to generate positive social and environmental impacts alongside financial returns. The presenters will discuss ESG from varying perspectives. They will also offer tips to energize the family enterprise and empower succeeding generations.

Dirk Jungé, *Pitcairn*, Chris Kerr, *entrepreneur*; Kat Rosqueta, *Center for High Impact Philanthropy, University of Pennsylvania*

Room: Boulevard A

Host: David King

⚡ **Electrifying Myths and Pitfalls : The case for family businesses in the Arab Middle East**

What do the myths of Zeus and the Phoenix tell us about family businesses in the Arab Middle East? What does it take for family businesses in the region to survive despite recurrent uncertain situations in the socio-economic and political arenas? Building on research and practice, the presenters will uncover the distinct dimensions that need to be taken into account in the process of analysis of these family businesses as compared to their counterparts in the Western world. Through interactive illustrations, they will invite you to reflect on how to deal with specific family and business issues and learn about the pitfalls to avoid in the advisory process.

Mohamed Mokadem, *Syrian Finnish Co. for Dairy Product*; Asher Noor, *Al-Touq Group, moderator*; Abdel-Razzak Wafi, *Wafi Group*

Room: Boulevard C

Host: Adib Rashid

⚡ **Rewiring the Grid: The impact of owner models on family business decision-making**

The structures and processes that guide family business decision-making function like an electrical grid. They funnel interests into actions. Just as the electrical grid must adapt in times of change, so must this grid. This session introduces frameworks to describe the family business grid and explores impacts of ownership change.

Vlad Barbieri, Josh Baron, *BanyanGlobal Family Business Advisors*; third presenter TBA

Room: Williford C

Host: Annika Hall

2:00PM–3:30 PM **IDEA LABS**

⚡ **Can Embracing Conflict Spur Positive Change? How the world's largest family businesses resolve disagreement**

This session focuses on the disputes and friction inevitable in family business. The world's largest family businesses are certainly no strangers to dealing with conflict. Nearly half of the 525 family businesses in the EY Global Survey report some level of dysfunctional conflict. It's how they deal with that conflict that makes the difference between success and failure, as well as family happiness and distress.

Joseph Astrachan, *Kennesaw State University*; Carrie Hall, *Ernst & Young*

Room: Williford A

Host: Leif Melin

⚡ **Four Live Wires That Can Short Circuit the Intergenerational Succession Process and Ideas for Rewiring the Grid**

Through reviewing cases, we explore four 'live wire' personalities that can cause an outage in the intergenerational succession process. Attendees will see how differing expectations can create a negative power surge, and how specific strategies can help reconnect the energy to build a more collaborative, effective grid for the future.

Daphne McGuffin, *BDO SuccessCare*; Maria Milanetti, *MarchFifteen Consulting*

Room: Williford B

Host: James Weiner

⚡ **Five Energizing Strategies: Keeping your clients empowered across generations**

This session focuses on how to recharge and re-energize clients across generations. The culture for a family business is like a battery — the big difference between those that last and those that run out of energy is whether the battery is rechargeable. The presentation will include handouts with checklists, templates, and sample newsletters not only for adults but also for children — all based on 224 years of Henderson and Perdue family business experience!

Mitzi Perdue, *author, speaker*

Room: Boulevard A

Host: Harvey Taraday

⚡ **Zip, Zap, Zoom! Using play and experiential education to energize families in business**

How do you energize the family? How do you positively ignite and cultivate connections that keep the family buzzing? PLAY! Studies show play makes one more empathetic, enhances relationships, and generates creativity. Have FUN in this session and learn activities that can spark conversations, connections and creativity.

Anbern Guarrine, John Guarrine, *The Guarrine Group*; Theresa Ramos, *Premier Family Business Consulting*

Room: Williford C

Host: Debbie Bing

Presenters subject to change

[Click here to register for the 2017 FFI Annual Conference](#)