



INSTITUTE FOR
FAMILY GOVERNANCE
2ND ANNUAL CONFERENCE 2018

WEDNESDAY
JAN 17, 2018
UNION LEAGUE CLUB
38 E 37TH ST, NYC

GOVERNANCE: FROM STRATEGY TO EXECUTION
Integrating Consulting, Financial, & Legal Advice

\$750 for IFG/STEP/FFI/PPI Members
\$950 for Non-members
\$350 for Single Family Office



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(STEP/FFI)



PROGRAM VICE-CHAIR
John E. Oden
(STEP)



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(Know How)



ADVISORY BOARD
Edouard Thijssen
(Families Liaison)

▼ **AGENDA**

- 7:45 AM Registration & Breakfast sponsored by **AllianceBernstein (AB)**
- 8:10 AM Welcome & Introduction
- 8:20 AM **Do You Need a Different Mindset to Create a Fortune Than to Hold Onto One?**
Dennis Jaffe, PhD, Wise Counsel Research
John W. Ambrecht, Ambrecht & McDermott (Moderator)
- 9:10 AM **Best Governance Practices for Family Held Operating Businesses**
Nancy Drozdow, CFAR
Mark E. Haranzo, Holland & Knight (Moderator)
- 10:00 AM Break sponsored by **Northern Trust**
- 10:20 AM **Governance Tools for Global Families**
Governance and Dispute Prevention Tools for Large, Family Controlled Businesses
Dr. Manuel Liatowitsch, Schellenberg Wittmer
The Organization and Governance of Family Wealth Management Structures - General Observations and Two Case Studies
Dr. Mario A. König, Marxer & Partner

- 11:40 AM **How to Avoid Unnecessary Litigation — Learning From Other People's Mistakes**
Zena M. Tamlar, Sullivan & Cromwell
Thomas J. Wiegand, MoloLamken
Robin Rathmell, Kobre & Kim
John E. Oden, AllianceBernstein (AB) (Moderator)
- 12:30 PM Lunch sponsored by **Willow Street Group**
- 1:15 PM **KEYNOTE: Purposeful Planning in Transitioning of a Family Enterprise — Practical Tools**
John A. Warnick, Esq., Purposeful Planning Institute
- 2:15 PM **Family Education and Family Vision — What Actually Works?**
Mitzi Perdue, Chair of Perdue Farms Education Committee
Anne Jeffrey Wright, Jeffrey Family Communication Officer
Edouard Thijssen, Trusted Family (Moderator)
- 3:15 PM Break sponsored by **Meritus Trust Company**
- 3:30 PM **How to Govern Your Family Office — Key Structuring Lessons From a Twenty-five Year Veteran**
James J. Ruddy, JJR Family Trust Consulting, LLC
Babetta von Albertini, PhD, ATM Capital Partners (Moderator)
- 4:30 PM **KEYNOTE: How to Create a Family Culture that Lasts More than a Century**
Mitzi Perdue, Author
- 5:30 PM Closing Reception hosted by the **Family Firm Institute**

For more information, visit IFGWorldwide.org
To register, visit tinyurl.com/IFGRegistration2018

