



INSTITUTE FOR
FAMILY GOVERNANCE
MIAMI CONFERENCE 2021

WEDNESDAY
DEC 1, 2021

1450 BRICKELL AVENUE, 23RD FLOOR
MIAMI, FLORIDA

FAMILY GOVERNANCE:
Empowering Beneficiaries through Inter-Generational Planning
From Strategy to Execution

\$650 for IFG Members
\$850 for Non-Members



CHAIR
Babetta von Albertini



VICE-CHAIR
Dennis Jaffe



ADVISORY BOARD
Jennifer Wioncek



ADVISORY BOARD
Francesca Boschini

▼ AGENDA

- 8:00 AM Registration & Breakfast sponsored by **Bilzin Sumberg**
- 8:30 AM Welcome & Introductions
- 8:40 AM **How to Structure Effective Governance Based On Four Distinct Ownership Models—An Interactive Discussion**
Vlad Barbieri, BanyanGlobal
- 9:30 AM **Family Governance Trends in Latin America and the Increased Importance of Trust Structures**
Santiago Ulloa, WE Family Offices
Juan Gabriel Reyes, Pérez Bustamante & Ponce
Jennifer Wioncek, Bilzin Sumberg Baena Price & Axelrod LLP, ACTEC Fellow, **MODERATOR**
- 10:30 AM Break
- 11:00 AM **Empower Beneficiaries to Promote Family Wealth and Harmony**
Babetta von Albertini, IFG Chair & General Counsel, ATM Capital Partners

- 11:40 AM **Family Governance Litigation & Dispute Resolution In the Region—What Worked and Why**
Clarissa Oliveira, Chinaglia Oliveira Advogados
Pedro Serrano Espelta
George Perlman, George D. Perlman, P.A.
Juan C. Antúnez, Stokes McMillan Antúnez, P.A.
Evelyn Sheehan, Kobre & Kim, **MODERATOR**
- 12:40 PM Lunch sponsored by **Private Life Solutions**
- 1:40 PM **Entrusted—Helping Clients Build Legacies That Last**
David R. York, York Howell, ACTEC Fellow
- 2:30 PM Break
- 2:50 PM **The Rising Generation's Perspective—How to Effectively Engage and Partner**
Gisela Lowenstein, G3 of the Lowenstein family
Cecilia Brandileone, G4 of a Brazilian industrial family
Maria Pia Leon, Forbes Family Trust, **MODERATOR**
- 3:50 PM Keynote sponsored by **Forbes Family Trust**
Planning for the Long Term—How to Build Resilient and Evolving Family Governance
Dennis Jaffe, BanyanGlobal
Bruno Carvajal, G5 of the Carvajal Family Council
- 4:50 PM Concluding Remarks
- 5:00 PM Cocktail Reception sponsored by **Charitable Gift America** and **Pol Roger**

For more information, visit IFGWorldwide.org
To register, visit <https://tinyurl.com/IFGMIAMI2020>

