



INSTITUTE FOR  
FAMILY GOVERNANCE  
MIAMI CONFERENCE 2022

THURSDAY  
DEC 1, 2022

HOSTED BY BILZIN SUMBERG  
BRICKELL, MIAMI

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

\$450 for IFG Members (\$550 regular)  
\$550 for Non-Members (\$650 regular)



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Babetta von Albertini



VICE-CHAIR  
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ADVISORY BOARD  
Jennifer Wioncek



ADVISORY BOARD  
Francesca Boschini

▼ AGENDA

- 8:00 AM Sign-In & Breakfast
- 8:30 AM Welcome & Introductions
- 9:00 AM **Building Bridges Between Generations**  
**Guillermo Salazar**, Exaudi Family Business Consulting
- 9:50 AM **Fiduciary Challenges: How to Assist Families with Inter-Generational Transitions — Case Studies**  
**Betty Andrikopoulos**, Crestbridge Fiduciary  
**Sara Schroter**, Meritus Trust Company Limited  
**David Warren**, Bridgeford Trust Company  
**Jennifer Wioncek**, Bilzin Sumberg Baena Price & Axelrod LLP, ACTEC Fellow, **MODERATOR**
- 10:50 AM Break
- 11:20 AM Keynote  
**Walking the Talk: How to Implement Shared Vision and Values in a Family Enterprise**  
**Peter Leach**, Peter Leach Associates
- 12:10 PM Lunch & Roundtable Discussions sponsored by **Crestbridge Fiduciary**
- 1:40 PM **Successful Inter-Generational Transitions: How to Change the Governance Structure to Make Room for the Next Generation — Case Studies**  
**Panel of Family Speakers**  
**Esteban Urrea**, G3 of the Urrea family  
**Bruno Carvajal**, G5 of the Carvajal family, **MODERATOR**
- 2:40 PM Break
- 3:00 PM **Practices for the Sustainability and Resilience of Family Enterprises**  
**Fredda Herz Brown, PhD**, Founder and Senior Consultant Relative Solutions
- 3:50 PM Keynote  
**How to Be Successful as a Family in the Long Run**  
**Edouard Thijssen**, G5 of Aliaxis Group
- 4:50 PM Concluding Remarks
- 5:00 PM Cocktail Reception sponsored by **Teton Trust Company**

For more information, visit [IFGWorldwide.org](https://www.IFGWorldwide.org)  
To register, visit <https://tinyurl.com/IFGMIAMI2022>

