



INSTITUTE FOR
FAMILY GOVERNANCE
3RD ANNUAL CONFERENCE 2019

THURSDAY
JAN 24, 2019
UNION LEAGUE CLUB
38 E 37TH ST, NYC

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

\$795 for IFG Members
\$995 for Non-Members
\$595 for Single Family Office



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▼ AGENDA

- 8:00 AM Registration & Breakfast sponsored by **AllianceBernstein (AB)**
- 8:15 AM Welcome and Introduction
- 8:30 AM Resilience of 100-Year Family Enterprises: How Opportunistic Innovation, Business Discipline, and Family Alignment Guide the Journey Across Generations
Dennis Jaffe, PhD, Wise Counsel Research
Edward Vergara, Arnold & Porter, MODERATOR
- 9:20 AM Governance Structures that Actually Fit a Psychological Model of Human Behavior
John W. Ambrecht, Ambrecht & McDermott, ACTEC Fellow
Michael D. Whitty, Freeborn & Peters LLP, ACTEC Fellow
- 10:10 AM Break
- 10:40 AM Adapt, Change or Disappear: Four-Dimensional Wealth
David R. York, York Howell, ACTEC Fellow
- 11:30 AM Fiduciary Challenges & Resolutions—Case Studies
Daniel F. Lindley, Northern Trust, ACTEC Fellow
Laurent Roux, Willow Street Group
Holly Harben Swan, U.S. Trust
Babetta von Albertini, PhD, Lansberg Gersick, MODERATOR

- 12:30 PM Lunch sponsored by **Willow Street Group**
- 1:40 PM Keynote sponsored by **Pitcairn**
Strengthening the Family Business by Empowering the Next Generation
Andrew Keyt, President of FBN North America
Carolyn A. Reers, Norton Rose Fulbright, ACTEC Fellow, MODERATOR
- 2:30 PM Crisis or Opportunity? How Best to Work through Challenging Family Business Transitions
Scott Mitchell, Mitchell Stores
Jamie Forbes, CAP, Forbes Legacy Advisors
Mitzi Perdue, Chair of Perdue Family Education Committee, MODERATOR
- 3:30 PM Break
- 4:00 PM NextGen Beneficiary Involvement with Social Impact Investing—Passing Fad or Transformative Opportunity?
Donnel Baird, BlocPower
Erin Harkless, Cambridge Associates
Drew Mason, Jade Capital Management, MODERATOR
Justin Kamine, Co-Founder KDC AG
- 5:00 PM Keynote sponsored by **Meritus Trust Company**
Texas Patriarch – The Rise and Fall of a Family Business
Doug Box, Box Family Advisors
- 5:50 PM Cocktail Reception sponsored by **U.S. Trust**

For more information, visit IFGWorldwide.org
To register, visit <https://tinyurl.com/IFGRegistration2019>

