

FAMILY FIRM INSTITUTE  
ANNUAL CONFERENCE



MIAMI  
2007

# CULTURE + ADAPTATION

FAMILY ENTERPRISE  
in a DIVERSE WORLD

THE FAIRMONT TURNBERRY ISLE  
RESORT & CLUB  
AVENTURA, FLORIDA  
OCTOBER 17 - 20, 2007

# GENERAL INFORMATION

## Date

- October 17 Pre-conference Day begins at 9:00AM  
Main conference begins at 6:00PM
- October 18-19 Main conference
- October 19-20 Research & Education Symposium

## Venue

The Fairmont Turnberry Isle Resort & Club Aventura, FL  
To make room reservations, call the Fairmont Turnberry at 800 257-7544. Mention the FFI conference to get the conference rate.



## Keynotes

DANIEL GILBERT

Professor of Psychology, Harvard University

ALEX JONES

Laurence M. Lombard Lecturer in the Press and Public Policy  
John F. Kennedy School of Government, Harvard University

ROSA SUGRAÑES

Chairman of the Board and founder of Iberia Tile Corporation

MOISÉS NAÍM

Editor-in-chief, *Foreign Policy* magazine

## Workshops in Spanish

Workshops marked with an asterisk (\*) will be offered in Spanish during lunch on Friday.

## Each Attendee Will Receive

- A copy of the **2007 American Family Business Survey**
- Attendee Profile and Contact List
- Working Materials and Program Book

## Three Ways to Register

- Phone 617 482-3045 (9AM-6PM EST)
- Fax 617 482-3049
- Online [www.ffi.org](http://www.ffi.org)

Dear Colleagues:

It is our pleasure to invite you to Miami this October for the 2007 Family Firm Institute Annual Conference!

The theme of this year's conference — "Culture and Adaptation" — highlights the complex tension between continuity and flexibility facing family businesses in a globalizing world. Beyond the competitive pressures imposed by international markets and the challenge of operating simultaneously in a wide array of jurisdictions, many business families are themselves "globalizing" — with their members living and raising the next generation in foreign cultures while still attempting to collaborate at a distance.

Our keynote presentations this year will include:

Dan Gilbert, a distinguished social psychologist from Harvard, who will challenge our assumptions about "planning"

Alex Jones, the Pulitzer Prize winning journalist and Harvard professor, who will discuss special issues faced by families in the newspaper business

Rosa Sugañes, a prominent entrepreneur who settled in Miami to build her own business while still retaining a critical role in her family's business in Spain

Moisés Naím, the distinguished internationalist who shares our passion for family enterprise

With more than 30 panels, workshops and case studies, the conference will offer something for everyone interested in examining the cultural dimensions of family, ownership, business strategy, and governance design.

Beyond the conference itself, we look forward to seeing you at the opening reception by the pool at the Fairmont Turnberry and on the breathtaking evening intercoastal cruise.

¡Bienvenidos a Miami!

Ivan Lansberg, Maria Dolores Moreno and Alan Carsrud

## 2007 Committees

### Program

Ivan Lansberg, chair  
*Lansberg, Gersick & Associates*  
Maria Dolores Moreno, co-chair  
*Lansberg, Gersick & Associates*  
Ernesto Poza, *The Garvin School of Management, Thunderbird*

Juan Roure  
*IESE*  
Guillermo Salazar  
*Fundacion Nexia*

### Research & Education

Alan Carsrud, chair  
*FIU: The Eugenio Pino & Family Global Entrepreneurship Center*  
Pat Cole  
*Nova Southeastern University*  
Sol Elvira Torres Lara  
*ITESM, Monterrey Tech*  
Dianne Welsh  
*The University of Tampa*  
Jorgé Yunis  
*Equity, S.A.*



LANSBERG



MORENO



CARSRUD

### Miami Advisory

Alan Carsrud, chair  
*FIU: The Eugenio Pino & Family Global Entrepreneurship Center*  
Fernando Alvarez  
*Future Quest LLC*  
Tracey Baker  
*The Seiden Law Firm*  
Patricia M. Cole  
*Nova Southeastern University*  
Kit Johnson  
Paul I. Karofsky  
*Transition Consulting Group, Inc.*

Daisy Medici  
*Asset Management Advisors*  
James A. Murphy  
*de Visscher & Co.*  
Henry A. Seiden  
*The Seiden Law Firm*  
Dianne Welsh  
*The University of Tampa*  
Jorgé Yunis  
*Equity S.A.*

# PRE-CONFERENCE SEMINARS

WEDNESDAY, OCTOBER 17

9:00AM – 4:00PM

## THE LAUNCHING PAD: CORE KNOWLEDGE FOR NEW FAMILY BUSINESS ADVISORS

Faculty: Larry D. Hause, Kim Schneider Malek

Understanding the many dimensions and dynamics of advice, consultations and education for a family-owned business is a critical factor as you differentiate yourself in the family business field. This unique interactive seminar is designed to help launch professionals new to the practice of family business advising. Participants in the seminar will be exposed to the core concepts of interdisciplinary advising through lectures, discussion and case studies.

9:00AM – 4:00PM

## DRAWING ON THE RIGHT SIDE OF THE BRAIN: APPLICATIONS FOR BUSINESS

Faculty: Brian Bomeisler

This workshop starts with a pre-instruction drawing and lecture on the brain processes underlying drawing, with explanation of the five basic component skills required to draw any perceived object, person or place. This includes suggestions for applying the thinking strategies of perception to business, problem solving and product creativity. Participants will experience three drawing exercises which will enable the shift and switch between and right and left mental modes. First an upside-down drawing from Picasso, secondly a pure contour drawing, and lastly a three dimensional drawing on their own hand using a flattened picture plane and transforming the flat two dimensional image into a three dimensional drawing. Throughout the day, reference will be made to the specific applications of the workshop participants.

*Enrollment limited to 20*

1:00PM – 4:00PM

## EXECUTIVE COACHING IN DEVELOPING AND DEVELOPED COUNTRIES: A GLOBAL PERSPECTIVE

Faculty: Gerard J. Donnellan, Florence Kaslow, Peter Leach, Jacobo Levinsky

Family business advisors who also offer executive coaching as part of their consultation can have enormous influence as change agents with the top leadership. This session will offer a global perspective on the unique challenges of executive coaching and leadership development in a family business context. The complex issues associated with coaching the leadership of family businesses are addressed. Emphasis is given to family businesses outside the US, including developing and developed countries in Latin America, Europe and elsewhere.

# MAIN CONFERENCE BEGINS

6:00PM

OPENING KEYNOTE

DANIEL GILBERT

**STUMBLING ON HAPPINESS:  
HOW WE MISPREDICT WHAT WILL MAKE US HAPPY – AND WHY**

Because we are the only animals that can peer deeply into our future, we can learn from mistakes before we make them, preview a variety of futures, and choose the one we think will bring us the most pleasure or the least pain. Sometimes. Unfortunately, research shows that we are not very good at this.

Author of *Stumbling on Happiness* (Knopf 2006), Harvard professor Dan Gilbert researches “affective forecasting” — or how and how well people can make predictions about the emotional impact of future events. A Guggenheim Fellow, winner of the Phi Beta Kappa Teaching Prize, he is also the recipient of the American Psychological Association’s Distinguished Scientific Award for an Early Career Contribution to Psychology.



7:30PM

OPENING RECEPTION

Meet and greet old and new friends at the Opening Reception by the pool at the Fairmont Turnberry with entertainment by the FIU Latin Jazz Band.



# MAIN CONFERENCE

THURSDAY, OCTOBER 18

8:00AM – 8:45AM INTERNATIONAL BREAKFAST

*Sponsored by de Visscher & Co., Pitcairn Financial Group  
and the Belgian Family Business Institute*

9:00AM – 10:30AM CONCURRENT WORKSHOPS

## FAMILY BUSINESS ADVISING IN LATIN AMERICAN COUNTRIES

Family business advising principles may be internationally applicable, but there are complex cultural differences that must be taken into account by family business advisors working in Latin America.

Marta Lucia Buraye, Patricia Arrázola

## FROM THE FAMILY BUSINESS REVIEW EDITORS

Research in the field continues to move at an impressive pace. Both practical and academic work has advanced greatly in the last year. The editorial team of *FBR* will examine some of the latest research findings from around the globe, including results from the 2007 *American Family Business Survey*.

Joseph H. Astrachan (chair), Leonard Bierman, Pramodita Sharma

## WHEN TALKING FAILS – MINORITY SHAREHOLDERS' RIGHTS AND POWERS

Disputes arising out of minority shareholders' dissatisfaction are frequent, bitter and sometimes cannot be resolved by talking about the problems. Understanding the nature of the legal claims that can be brought as the result of such disputes and how the legal system deals with these claims helps consultants manage expectations.

Henry C. Krasnow

## MAINTAINING ENTREPRENEURIAL SPIRIT THROUGH GENERATIONS\*

The leaders of two leading Spanish enterprising families will share with the audience their direct experience of leading generation and transformational change while sustaining a growth-driven entrepreneurial capacity.

Juan Roure (chair), Simón Pedro Barcelo, TBA

## TRANSFORMATION IN SOUTH AFRICA: THE IMPACT OF GOVERNMENT'S BROAD-BASED BLACK ECONOMIC EMPOWERMENT (BEE) POLICIES ON FAMILY BUSINESS

Family businesses in South Africa have been slow in responding to the Broad-based Black Economic Empowerment initiatives. Focus areas include “a dynastic family contribution” and becoming a BEE entity.

Antony Stanley Balshaw

## FLOURISHING FAMILIES: THE NATURE OF FAMILIES OF AFFINITY AND THE PARADOXES THAT DISENABLE THEM

Families who are at zero seeking to reach plus one and to flourish have had very little professional support for their journeys, while those below zero have had an excess. This talk will focus on the transitions families of affinity face on their seven generation journeys to avoid the outcome predicted by the universal cultural proverb “shirt sleeves to shirt sleeves in three generations.”

James E. Hughes

11:00AM – 12:30PM CONCURRENT WORKSHOPS

**THE NEXT GENERATION FAMILY BUSINESS LEADER IS GLOBAL\***

This panel explores the global mindset of the next generation in the family business as it assumes leadership for continuity of the family enterprise.

Ernesto J. Poza (chair), panel TBA

**MICROFINANCE: A 'HAND-UP' FOR FAMILY-BUSINESSES IN THE DEVELOPING WORLD**

A unique solution to break the cycle of poverty, called microfinance, has emerged in recent years. Microfinance provides a unique opportunity for wealthy families in business together to provide much-needed and sustainable help for poor families and their businesses.

F. Tom McCullough, Wendy Cox

**THE MEXICAN EXPERIENCE\***

Panelists share their experiences working with Mexican businesses, focusing on the importance of family rootedness for the promotion of loyalty and union towards the family and the business.

Sergio Garza Trejo, Idalia Salazar, Carolina Vergara

**WHAT WEALTHY WOMEN REALLY WANT: DISPELLING THE MYTHS AROUND WOMEN & WEALTH**

This presentation will engage audience members to test prevailing myths about women's attitudes, concerns, values and intentions when it comes to wealth — and compare their responses to the findings of a recent study that engaged more than 100 affluent women whose combined net worth exceeds \$2 billion.

Kirby Rosplock (chair), Fredda Herz Brown, Dennis T. Jaffe

**A VALUE-ADDED MINORITY INVESTMENT APPROACH TO FUNDING THE FAMILY BUSINESS**

Focusing on growing a family business, this interactive case study shows that the right, minority investment approach from a private equity investor can add significant value for family business owners.

Ken Hanau

**WORST PRACTICE WORKSHOP: THREE COMMON BUT AVOIDABLE MISTAKES IN FAMILY PHILANTHROPY**

Participants in this panel will explore three case studies of common mistakes made in establishing, transitioning, and administering family philanthropy, and learn to identify red flags and change direction before it's too late.

Eric Kessler

12:45PM – 2:30PM

**AWARDS LUNCH**

*Sponsored by MassMutual*



## THURSDAY, OCTOBER 18 cont'd

3:00PM – 4:30PM

### CONCURRENT WORKSHOPS

#### SUCCESSION GONE WRONG: ONE FAMILY'S DESTINY AND DILEMMA\*

Paul Smith has led a family company for more than 40 years. Now, our protagonist faces one of the most decisive moments of his life: retirement, succession, and transfer of control to his children. Thus begins “Succession Gone Wrong,” an original production of Fundacion Nexia. Produced as an interactive movie, it promotes debate and dialogue using the consultants’ experiences and know-how.

Guillermo Salazar, Jaume Tomás Carulla

#### FAMILY WARS

In this presentation the authors of *Family Wars* discuss the darker side of family business – what is really at the root of family business warfare.

Grant Gordon, Nigel Nicholson

#### BUILDING THE NEXT GENERATION IN DUBAI: LEADERSHIP DEVELOPMENT IN THE GLOBAL CULTURE

This interactive case study will focus on the impact of culture in an Action Learning program of next generation leaders in Dubai, i.e., situating the participants’ experiences within their increasingly global context and the nature of leadership development within a family-based organizational structure.

Chatham Sullivan, Barry Dornfeld

#### THE BONDING RITUALS\*

Lupo, a fourth generation family business in Brazil, faces the challenge of keeping alive the bonds between the family shareholders and the company. This presentation shows how the founder’s bonding rituals are being adapted for the Internet.

Elvio Lupo

#### WHAT MADE YOU RICH WON'T KEEP YOU RICH: THE SUCCESS PARADOX

How a family business became successful is not typically the key to sustaining the wealth for future generations. This session addresses how to identify obstacles and implement best practices for preserving wealth over generations.

Maria Elena Lagomasino, Henry Perry

#### THE ROOTS OF ADAPTABILITY

Family businesses have a special need to be adaptable, as long term survival and success and continuity is their fundamental purpose. A study of 100+ year old family firms offers several insights into the keys to business strategic adaptability.

John L. Ward

4:45PM – 5:45PM

### KEYNOTE

## ALEX JONES

#### SPECIAL ISSUES FACED BY FAMILIES IN THE NEWSPAPER BUSINESS

Join Alex Jones, author of *The Patriarch: The Rise and Fall of the Bingham Dynasty* and shareholder in his own family’s newspaper company, as he discusses the unique issues of family businesses in the fast-paced, modern, often controversial, newspaper world.



## FRIDAY, OCTOBER 19

7:45AM – 8:30AM

FFI ANNUAL MEETING & BREAKFAST

9:00AM – 10:15AM

KEYNOTE

### ROSA SUGRAÑES

Rosa Sugrañes is chairman of the board and founder (1979) of Iberia Tiles, one of the largest independently owned distributors of ceramic tile, marble and stone in the Southeast U.S. She is also a member of the board of her family company, Rosa Gres Group of Barcelona, Spain. Past chairman of the Federal Reserve Bank of Atlanta, Miami Branch, and recently chairman of the Greater Miami Chamber of Commerce, Ms. Sugrañes is on the board of trustees of Florida International University (FIU).



10:30AM – 12:00PM

CONCURRENT WORKSHOPS

#### FACILITATING SUCCESSION OF OWNERSHIP IN FAMILY BUSINESSES: A NATIONAL PROGRAM (THE SWEDISH CASE)

Focusing on ownership succession in family businesses in Sweden, this panel discusses the role of the government in supporting and facilitating ownership and generational succession in family businesses.

Leif Melin (chair), Ethel Brundin, Sigbritt Larsson, Mattias Nordqvist

#### THE ART OF ADAPTATION: NEGOTIATING DIFFERENCES AS THE FAMILY BUSINESS EVOLVES

This session presents a framework for surfacing and “negotiating” differences at key transition moments to help family businesses adapt and respond to conflict and at the same time preserve the cultural aspects that are deeply rooted in the family’s identity and history.

Debbie Bing, Beulah Trey

#### CROSS CULTURAL CONSULTING

Examining which concepts, assessment approaches, tools, interventions, legal and financial issues do (and do not) translate across diverse cultures, this panel will present perspectives on consulting to family enterprises from Japanese, Turkish, Brazilian and US cultures.

Sam H. Lane (chair), Haluk Alacaklioglu, Michael Ning, Joe Paul, René A. Werner

#### TEAM CANADA: A CASE FOR COLLABORATION

A panel of stakeholders will present a case study of a Canadian holistic model of collaboration, demonstrating how they successfully dealt not only with regional diversity and needs from rural to urban communities, but frequently with organizational cultural differences and priorities.

Denise Paré-Julien (chair), Judi Cunningham, John Daniel Mosher, David Simpson

## FRIDAY, OCTOBER 19 cont'd

### THE RUG ITSELF: CULTURE AND HISTORY IN LATIN AMERICAN AND CHINESE FAMILY ENTERPRISE

This session will explore the impact of culture, social norms, and history on contemporary family business in Latin America and in China.

Kelin Gersick (chair), Flavia Buarque de Almeida, Michèle Desjardins

### THE MULTI-FAMILY OFFICE: MULTI-DISCIPLINARY BY DEFINITION!

This workshop will focus on the Multi-Family Office industry, or MFO, to clarify the makeup and value of an MFO, explain why MFOs are growing so quickly, and suggest how to work most effectively with an MFO.

F. Tom McCullough, Dirk Jungé

12:00PM – 1:45PM

LUNCH ON YOUR OWN

12:00PM

RESEARCH & EDUCATION SYMPOSIUM BEGINS

See page 12 for details

2:00PM – 3:30PM

CONCURRENT WORKSHOPS

### ENGAGING THE NEXT GENERATION

There are four generations above the age of twenty-one in today's society and around the family business and philanthropy tables. This session will offer practical tools for conversations on values and legacies to help navigate the generations with family members involved in multigenerational enterprises.

Sharna Goldseker

### CHINA AND THE FAMILY-OWNED BUSINESS: THREAT OR OPPORTUNITY?

Many family-owned businesses may view China's rapidly-expanding economy as a threat to their viability, but this session will attest to the successes that many businesses experience when they spawn greater viability through active participation in China and other growing, wealthy Asia economies.

William T. Revis, Frank Oropeza

### HOW FAMILY CULTURE GENERATES DIFFERENT TYPES OF FAMILY BUSINESSES\*

According to a study performed with more than 1200 Spanish family business, not all family businesses are equal! This workshop will examine different family business typologies and discuss how cultural frames determine these typologies.

Alberto Gimeno (chair), Gemma Baulenas, Maria Jose Parada

### STORIES IN SUCCESSION

A good story is magic...it informs, teaches and inspires. Condensed from fifty hours of interviews with two families taped over four years, Stories in Succession will provide the opportunity for compelling conversation and new ideas with participants in this workshop.

Kathy Wiseman

FRIDAY, OCTOBER 19 cont'd

3:45PM – 5:15PM

CLOSING KEYNOTE

*Sponsored by Lansberg Gersick & Associates*

## MOISÉS NAÍM

### GLOBALIZATION AND THE FAMILY FIRM: THE GOOD, THE BAD AND THE UGLY

What are the effects of a more integrated world on family firms? From the role of women to the cost of capital and from corporate governance standards to the expectations of top managers, most of the factors that drive the performance of family firms are being altered by globalization. Can this turmoil be managed? How?



Moisés Naím, editor-in-chief of *Foreign Policy* magazine, heads one of the world's leading publications on international politics and economics. He has written extensively on international political economy, economic development, international finance, world politics, and globalization's unintended consequences. His bestselling book, *Illicit: How Smugglers, Traffickers and Copycats Are Hijacking the Global Economy*, was selected by the *Washington Post* as one of the best nonfiction books of 2005.

KICKOFF TO LONDON

*Sponsored by The Norelli Company*

Mark your calendars for October 29–31, 2008 at One Great George Street in Westminster, London

Program chair:

Alex Scott, *SandAire, Ltd.*

London Chair:

Peter Leach, *BDO Centre for Family Business*

7:00PM – 11:00PM

GALA DINNER – BE TROPICAL, WEAR WHITE!

CRUISE THE INTERCOASTAL ON BOARD  
THE GRAND FLORIDIAN

Enjoy a gala dinner aboard one of Miami's most luxurious yachts, *The Grand Floridian*. With four decks this majestic vessel features a tastefully decorated salon with three fireplaces, exquisite dining and a dance floor. The ship's upper deck offers intimate views of the stately homes along the inland waterway, and is the perfect place to see the sun setting at the close of the 2007 conference. Join us for an enchanted evening of food and fun. And — wear white, please!!

# FAMILY BUSINESS RESEARCH & EDUCATION SYMPOSIUM

FRIDAY, OCTOBER 19

12:00PM – 1:15PM

LUNCH

1:30PM – 2:30PM

PLENARY I

## INTERNATIONAL PERSPECTIVES ON FAMILY BUSINESS RESEARCH

This panel discussion reviews the latest themes and thrusts of family business research and theory building from the perspective of participants in the growing number of family business research conferences. The panel will provide insights into the most recent research pre-publication.

Alan Carsrud (chair), James Chrisman, Kim Eddleston, Frank Hoy

2:45PM – 3:30PM

PLENARY II

## BUILDING FAMILY BUSINESS PROGRAMS: COMBINATIONS & PERMUTATIONS

In this panel, various approaches to building sustainable family business programs are provided from the US, Latin America, and Europe. Suggestions are presented for innovative ways to provide educational programs to both family firms and students.

Alan Carsrud (chair), Patricia Cole, Bahar Gunver,  
Sol Elvira Perez Torres Lara, Dianne Welsh, Jorgé Yunis

3:45PM

KEYNOTE (see page 11)

SATURDAY, OCTOBER 20

8:00AM

CONTINENTAL BREAKFAST

9:00AM – 10:30AM

CONCURRENT SESSIONS 1A & 1B

RESEARCH ON GENDER AND WHY IT MATTERS (1A)

Patricia Cole, chair

- **THE GENDER ROLES IN FINNISH BUSINESS:** Tarja Römer-Paakkanen,  
Taru Hautala
- **INVESTIGATION OF THE RELATIONSHIP EXISTING BETWEEN  
PLANNING ACTIVITIES, GENDER AND RELIGION IN A FAMILY BUSINESS:**  
Josiane Fahed-Sreih
- **THE ROLE OF WOMEN IN HISPANIC FAMILY BUSINESSES:**  
Maritza Soto

INTERNATIONAL PERSPECTIVES ON FAMILY BUSINESS  
GOVERNANCE: HOW IT CAN WORK AND HOW IT HAS WORKED (1B)

Bahar Gunver, chair

- ENTREPRENEURIAL AND INNOVATIVE BOARDS OF FAMILY FIRMS:  
Pablo Hafner
- COHERENCE AND COHESION OF THE EXECUTIVE TEAM IN MEDIUM-SIZED  
FAMILY FIRMS: THE CASE OF SOME HOTELS  
IN YUCATAN: Luis Felipe Cisneros Martinez, José Luci Pech Vargues
- FAMILY GOVERNANCE IN ESSENCE WITHIN A GLOBAL ENVIRONMENT:  
Carmen Galve Górriz, Vicante Salas Fumás

10:45AM – 12:15PM CONCURRENT SESSIONS 2A & 2B

SPIRITUALITY, SELF-EFFICACY AND PUTTING IT ALL TOGETHER (2A)

Dianne Welsh, chair

- BUSINESS FAMILY EDUCATIONAL MATRIX: Cláudia Tondo
- SELF-EFFICACY IN THE FAMILY BUSINESS ENTERPRISE–  
WHY IT MATTERS: John Simmering, Justin Anderson
- SUBJECTIVE WELL-BEING OF THE FAMILY BUSINESS OWNER-  
ENTREPRENEURS AS REFLECTION OF SPIRITUALITY: Sofia Kauko-Valli

THREE C'S FOR FAMILY BUSINESSES: CRISIS, CHANGE AND  
CHALLENGES – EVIDENCE FROM THE AMERICAS (2B)

Sol Elvira Perez Torres Lara, chair

- FAMILY BUSINESS AND SUCCESSION PROCESSES AMONG ETHNIC  
MINORITY GROUPS: LESSONS FROM THE LATINOS IN MONTREAL:  
Sebastien Arcand, Luis Felipe Cisneros Martinez
- MEDIUM AND LARGE BRAZILIAN FAMILY BUSINESS: A NEW PERSPECTIVE  
ON THEIR CHARACTERISTICS AND CHALLENGES: Alexis Novellino
- THE ONLINE SURVEY AS A STRATEGIC PLANNING TOOL FOR  
SMALL-TO MID-SIZED FAMILY ENTERPRISES: Maryanne Wanca-Thibault
- FAMILY BUSINESS IN ARGENTINA AND PERFORMANCE OF FAMILY FIRMS  
DURING 2001/2002 ECONOMIC CRISIS: Ernesto Niethardt

12:30PM – 2:00PM

CLOSING LUNCH WITH LIVE CASE:  
EL DORADO FURNITURE – THE CAPO FAMILY  
(INVITED)



## PRE-CONFERENCE PRESENTERS

### **Brain Bomeisler**

Drawing on the Right Side  
of the Brain  
New York, NY USA

### **Gerard J. Donnellan**

Big Leap  
Lexington, MA USA

### **Larry D. Hause**

Fredrikson & Byron P.A.  
Minneapolis, MN USA

### **Florence Kaslow**

Kaslow Associates, P.A.  
Palm Beach Gardens  
FL USA

### **Peter Leach**

BDO Centre for Family  
Business  
London, England

### **Jacobo Levinsky**

Coaching Soluciones  
Mexico, Mexico

### **Kim Schneider Malek**

Schneider Consulting Group  
Denver, CO USA

## MAIN CONFERENCE PRESENTERS

### **Haluk Alacaklioglu**

Family Business  
Consulting, Inc.  
Istanbul, Turkey

### **Patricia Arrázola**

Prieto & Carrizosa S.A.  
Bogotá, Colombia

### **Joseph H. Astrachan**

Kennesaw State University  
Kennesaw, GA USA

### **Antony Stanley Balshaw**

Grant Thornton-Eastern  
Cape  
East London, South Africa

### **Simon Pedro Barcelo**

Barcelo Corporacion  
Empresarial  
Barcelona, Spain

### **Gemma Baulenas**

Family Business Knowledge  
Barcelona, Spain

### **Leonard Bierman**

Texas A&M University  
College Station, TX USA

### **Debbie Bing**

CFAR  
Cambridge, MA USA

### **Fredda Herz Brown**

Relative Solutions  
Cresskill, NJ USA

### **Ethel Brundin**

Jönköping International  
Business School  
Jönköping, Sweden

### **Marta Lucia Buraye**

Legal & Business Consulting  
Bogotá, Colombia

### **Flavia Buarque de Almeida**

Participacoes Morro  
Vermelho  
Sao Paulo, SP Brazil

### **Wendy Cox**

Opportunity International  
Sarasota, FL USA

### **Judi Cunningham**

University of British  
Columbia  
Vancouver, Canada

### **Michèle Desjardins**

Lansberg, Gersick &  
Associates  
Montreal, Canada

### **Barry Dornfeld**

CFAR  
Philadelphia, PA USA

### **Paul Funk**

Frank Crystal & Co. Inc.  
New York, NY USA

### **Sergio Garza Trejo**

Optima Negocios Familiares  
SA de CV  
Tampico, Mexico

### **Kelin Gersick**

Lansberg, Gersick &  
Associates  
New Haven, CT USA

### **Alberto Gimeno**

ESADE Business School  
Barcelona, Spain

### **Sharna Goldseker**

The Andrea and Charles  
Bronfman Philanthropies  
New York, NY USA

### **Grant Gordon**

Institute for Family Business  
(UK)  
London, England

### **Ken Hanau**

3i  
New York, NY USA

### **James E. Hughes**

Aspen, CO USA

### **Dennis T. Jaffe**

Relative Solutions  
San Francisco, CA USA

### **Dirk Jungé**

Pitcairn Financial Group  
Jenkintown, PA USA

### **Eric Kessler**

Arabella Philanthropic  
Investment Advisors  
Washington, DC USA

### **Henry C. Krasnow**

Krasnow Saunders  
Cornblath, LLP  
Chicago, IL USA

### **Maria Elena Lagomasino**

Asset Management Advisors  
Palm Beach Gardens  
FL USA

### **Sam H. Lane**

LBF & Associates  
Fort Worth, TX USA

### **Sigbritt Larsson**

Nutek - The Swedish  
National Agency for Business  
Development  
Stockholm, Sweden

### **Elvio Lupo**

Legare Family Business  
Management  
Sao Paulo, Brazil

### **F. Tom McCullough**

Northwood Stephens Private  
Counsel Inc.  
Toronto, Canada

### **Leif Melin**

Jönköping International  
Business School  
Jönköping, Sweden

### **John Daniel Mosher**

P.J. Gardner Institute  
St. John's, Canada

### **Nigel Nicholson**

London Business School  
London, England

### **Michael Ning**

Arque Orion Winter  
Skies, Ltd.  
Rolling Hills Estate  
CA USA

### **Mattias Nordqvist**

Jönköping International  
Business School  
Jönköping, Sweden

- Frank Oropeza**  
The Norelli Group  
Charlotte, NC USA
- Maria Jose Parada**  
ESADE Business School  
Sant Cugat del Vallés, Spain
- Denise Paré-Julien**  
Business Families Foundation  
Montreal, Canada
- Joe Paul**  
Aspen Family Business  
Group  
Portland, OR USA
- Henry Perry**  
Asset Management Advisors  
Palm Beach Gardens, FL USA
- Ernesto J. Poza**  
Thunderbird, The Garvin  
School of International  
Management  
Scottsdale, AZ USA
- William T. Revis**  
The Norelli Group  
Beijing, China
- Kirby Rosplock**  
Asset Management Advisors  
Palm Beach Gardens  
FL USA
- Juan Roure**  
IESE Business School  
Barcelona, Spain
- Guillermo Salazar**  
Fundacion Nexia  
Barcelona, Spain
- Idealía Salazar**  
Optima Negocios Familiares  
SA de CV  
Tampico, Mexico
- Pramodita Sharma**  
Wilfrid Laurier University  
Waterloo, Canada
- David Simpson**  
The Richard Ivey School  
of Business  
London, Canada
- Chatham Sullivan**  
CFAR  
Philadelphia, PA USA
- Jaume Tomás Carulla**  
Fundación Nexia  
Barcelona, Spain
- Beulah Trey**  
CFAR  
Philadelphia, PA USA
- Carolina Vergara**  
Optima Negocios Familiares  
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**MIAMI  
2007**

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October 17-20, 2007

The Fairmont Turnberry Isle Resort & Club Aventura, FL

Registration fees subject to change on August 15, 2007

Check the appropriate box(es) and enter the total at the bottom..

All fees are in U.S. dollars.

MAIL to: FFI, 200 Lincoln Street, #201, Boston, MA 02111

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	Day Rate <input type="checkbox"/> Thursday or <input type="checkbox"/> Friday	Main conference begins Wednesday 6:00PM	Day Rate <input type="checkbox"/> Thursday or <input type="checkbox"/> Friday	Main conference begins Wednesday 6:00PM
Individual	<input type="checkbox"/> \$550	<input type="checkbox"/> \$990	<input type="checkbox"/> \$910	<input type="checkbox"/> \$1350*
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#### TOTAL

\_\_\_\_\_



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### REGISTRANT INFORMATION

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