



INSTITUTE FOR
FAMILY GOVERNANCE

You are invited to the **IFG Miami 2024 Pre-Conference Workshop**
on **Wednesday, Dec. 4th, from 1:30-4:30 pm.**



SPEAKER

Elizabeth Bagger, Avanti FBA

EVENT DETAILS

Wednesday, Dec. 4th, 2024

1:15 pm Sign-in

1:30-4:30 pm Workshop

TOPIC

Do Family Businesses Also Need an Ownership Strategy to Supplement the Business Strategy? Case Studies

Why have an ownership strategy for your family business? Family business ownership is complex and about so much more than money alone. Purpose and values are key. Emotions come into play, sometimes when we least expect them to and they can derail sound decision making. However, the stable, solid ownership of a company is key to its sustained success and there is a direct link between financing a company's working capital and making strategic choices. Strategic choices owners need to be able to make together. This is why having an ownership strategy can be helpful, perhaps even mission critical, to how a family operates their business and how they execute their role as owners. Whilst some guidelines may exist, many families don't have an ownership strategy. An ownership strategy should become a part of a family's wider family governance and hence provide clear family objectives and criteria on how to achieve those objectives. In this interactive workshop, Elizabeth will delve into (i) what an ownership strategy is, (ii) why a family business should have one, and (iii) how to go about creating an ownership strategy.

SPEAKER BIO

Elizabeth is a passionate supporter of and advocate for family owned businesses. She is the founder of Avanti Family Business Advisory, a boutique advisory firm that helps families strengthen their family dynamics, family governance and next generation engagement. Before starting Avanti FBA in 2021, Elizabeth was the Director General of the Institute for Family Business, a UK based membership organisation that lobbies Government on behalf of the family business sector and brings together family businesses for the purpose of learning and networking. Prior thereto, she worked in corporate governance and in her own family business where she now serves as an NED. Elizabeth holds a certificate in family business advising from FFI and is a certified facilitator. She divides her time between the US and Mexico and works globally.

VENUE

Deutsche Bank Center
600 Brickell Avenue, 20th Floor
Miami, Florida 33131

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