



INSTITUTE FOR  
FAMILY GOVERNANCE

You are invited to the **IFG New York Pre-Conference Workshop** on Monday, May 13.  
Register now to hear:



## SPEAKER

**Amy Wirtz**

## EVENT DETAILS

**Monday, May 13, 2024**

1:15 pm Sign-in

1:30 pm–4:30 pm Workshop

## TOPIC

### ***When Ownership is Held Within Generational Legacy Trusts: Best Practices for Supporting Multiple Generations of Family Business Owners, Leaders, and Governance Systems***

Amy Wirtz, JD, Senior Family Business Consultant of FBCG will be leading a lively discussion and an educational case study that will examine best practices when a family enterprise is encased within one or more generational trusts. Amy believes that for such trusts to be sustainable, there is an intrinsic need for a governance system to be embedded within the generational trusts to align the trustees and beneficiaries. Amy will examine both the benefits and the complexity created when trusts own your family business and wealth. Topics that will be discussed include: How do you prepare the current generation of trustees, beneficiaries, and leaders of your wealth for success? What topics do the next generations need to traverse?

## SPEAKER BIO

Amy is a senior consultant with The Family Business Consulting Group. She works closely with families to identify their goals around values, ownership and financial wealth. To support these goals, Amy helps families establish family offices, family councils and enterprise governance systems. Amy believes her role as an advisor is to educate families and business leaders on options and support systems that are available to assist in their continued growth and aligned vision. Once the family is aligned on their decision, she assists the family, owners and leadership team in developing their implementation plan and ensures that it stays on target. Amy brings a diverse range of education and experience to family enterprises including a bachelor's degree in secondary education and law degree. She served as a lawyer for 27 years, with the last 10 years practicing collaborative law. Amy is also a trained mediator and skilled facilitator in conflict resolution, communication and listening skills.

## VENUE

### **Deutsche Bank Center**

One Columbus Circle, Brooklyn Room, 10<sup>th</sup> floor,  
New York, 10019

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