



INSTITUTE FOR
FAMILY GOVERNANCE
5TH ANNUAL CONFERENCE 2022

TUESDAY
MAY 10, 2022
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
\$695 for Single Family Office



CHAIR
Babetta von Albertini



VICE-CHAIR
Dennis Jaffe



VICE-CHAIR
John E. Oden



VICE-CHAIR
David R. York

▼ AGENDA

- 8:00 AM Sign-In & Breakfast sponsored by **AllianceBernstein (AB)**
- 8:30 AM Welcome & Introductions
- 8:40 AM **Owner Strategy: How Do You Define Success for Your Family Business?**
Josh Baron, BanyanGlobal
Sarah Constantine, Esq., Arnold and Porter, **MODERATOR**
- 9:30 AM **Empower the Next Generation through the Design of Your Family Office**
Daniel G. Berick, Esq., Americas Chair, Corporate, Squire Patton Boggs
Christine Chang, Principal, Avire Finance USA
- 10:20 AM Break
- 10:50 AM **How to Design and Implement an Effective Family Business Board**
Babetta von Albertini, Esq., IFG Chair & General Counsel, ATM Capital Partners
Brendan Wall, CEO and family board member of Wall Family Enterprise

- 11:40 AM Keynote sponsored by **Concord Trust**
Importance of Family Values: Challenges and Lessons Learned
Matthew Fleming, G5 of the Fleming family
- 12:30 PM Lunch & Roundtable Discussions sponsored by **Willow Street**
- 2:00 PM **Bringing Shareholders Agreements to Life (and Vice Versa)**
Michael J. Gillespie, Esq., Debevoise & Plimpton
Ivan Lansberg, Lansberg Gersick & Associates
- 2:50 PM Break
- 3:20 PM **How to Use the Family Fortune to Serve One's Community**
Joya Sonnenfeldt, G2 of the Sonnenfeldt and G3 of the Goldman family
Bruno Carvajal, G5 of the Carvajal family
Jason Ingle, G5 of the Ford family, **MODERATOR**
- 4:20 PM Keynote sponsored by **Pitcairn**
Legendary Families: How to Win the America's Cup Multiple Times in a Row
Halsey Herreshoff, G3 of the Herreshoff family
- 5:20 PM Concluding Remarks
- 5:30 PM Cocktail Reception sponsored by **Bridgeford Trust Company** and **Pol Roger**

For more information, visit [IFGWorldwide.org](https://www.ifgworldwide.org)
To register, visit <https://tinyurl.com/IFGNyc2022>

