

Cambridge Judge Business School
Executive Education

7-11 October 2019

RESPONSIBLE FAMILY BUSINESS & WEALTH OWNERSHIP

Dealing with today's business challenges, to improve the wellbeing and financial and business interests of families, societies and communities through the theme of the Circular Economy.



UNIVERSITY OF
CAMBRIDGE
Judge Business School

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Programme summary

Family business and wealth ownership is expanding, and demand for learning and support in this area in an increasingly complex world is well established. This programme aims to improve not only the well-being and financial and business interests of the families involved, but of the societies and communities in which we all live and operate.

The programme will address issues relating to: exposing the issues facing family business entrepreneurs, managing passive asset ownership effectively, planning for growth balancing family culture, tradition and business strategies, governing interwoven and conflicting matters shaping the development of the family business and the business family, crafting a transgenerational succession and engagement plan that ensures family business continuity and mastering entrepreneurial, managerial, leadership, ownership, wealth management, financial and risk management matters.

The programme has been developed with Iraj Ispahani of Ispahani Advisory and Philip Marcovici of the Offices of Philip Marcovici.

Theme: The Circular Economy and Family Business

For 2019, the theme of the Programme will be the circular economy. Led by Professor Khal Soufani, the Academic Programme Director and the Director of the Cambridge Judge Circular Economy Centre, the faculty for the 2019 programme are gearing up for what will be an innovative and valuable approach to examining issues relevant to global family business and wealth owners. This year the programme will seek to identify opportunities and benefits of a circular approach in a much wider context than is normally considered.

Soon family businesses will have up to four generations managing their organisations. Key issues around strategy and direction will come from different perspectives and from generations with varied priorities – the circular economy brings those perspectives together in a holistic and beneficial way for the business and society as a whole. Family businesses are in a unique position in terms of leveraging this benefit with a medium-to-long term view.



Coverage of topics

A summary of topics to be covered:

- Family Businesses and the Circular Economy
- Understanding Conflicts of Interest and Political Change
- Supporting our Communities and Why this Matters
- Developing a Strategic Growth Mindset
- Navigating the New Innovation Landscape
- Organisational Behaviour and the Family Business
- Family Governance – Family Constitutions and More
- Leadership in Families and Family Businesses
- Building Effective Teams
- International Taxation and the Needs of Wealth and Business Owners in the Coming Decades: Political Risk Minimisation Planning, Asset Protection and the Real Challenges Coming Up
- Alternative Finance
- The Structures Families Use – Trusts, Partnerships, Foundations and the Other “Animals in the Zoo”
- Reconciling the Past and Future of Your Family Business

The circular economics overlay to the topics to be covered in 2019 will provide participants with a unique opportunity to explore what is meaningful for families, family business and family wealth, and how doing things in new ways may bring new opportunities for growth, sustainability, excitement, engagement and longevity.

Participants will also have the opportunity to select from several ‘interest streams’ of their choice including:

- Learning from others: Methodologies of successful businesses
- Understanding Conflicts of Interests and Political Change: Protecting family interests through a different way of engaging with Advisors and with Governments
- Community Focus: Why supporting our communities works for families and family businesses



Who is the programme for?

This programme will be restricted to family members, affording a safe environment for sharing and learning from peers. We would welcome: owners of family businesses and next generation family business owners; owners of family passive assets and principals within family offices. In particular we encourage multiple generations of family members to attend together.

The dates for the four day programme sees participants arriving for an introductory dinner on the evening of October 7 and finishing on the afternoon of the 11 October.

In addition to the topics covered there will be two dinners one, at Trinity Hall College, both of which will include a distinguished guest speaker.

Additional options can be added to the end of the programme to meet the needs of individual family requirements.

Dates and fees

7-11 October 2019

The programme fee is £6,995 (exclusive of VAT). Fee includes instruction, materials, lunches and refreshments.

Acceptance onto this programme is by application to ensure the group is homogenous in terms of objectives and experience.



Faculty and speakers

Dr Khaled Soufani

Senior Faculty in Management Practice & Director of the Circular Economy Centre
Cambridge Judge Business School

Professor Christoph Loch

Director of Cambridge Judge Business School & Professor of Management Studies

Iraj Ispahani

Founding Advisor
CEO Ispahani Advisory

Philip Marcovici

Founding Advisor
Consultant, The Offices of Philip Marcovici

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The organisers reserve the right to change any details of the Programme without notice.

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