



MULTIGENERATIONAL FAMILY BUSINESS

A Top Management Program

May 15, 16, and 17, 2023

Manila, Philippines



The two-day Multigenerational Family Business Program will be conducted by the Cambridge Institute for Family Enterprise, led by Dr. John A. Davis, Faculty Director of Family Enterprise programs at the M.I.T. Sloan School of Management, and Chairman and Founder of Cambridge Family Enterprise Group, in partnership with the Asian Institute of Management. The program offers family businesses in the Philippines an opportunity to learn and share strategies for sustaining a competitive business, and a united family and ownership structure into the next generation.

The optional third day is also available to families who want to have private consultations with our expert faculty from Cambridge at the Asian Institute of Management campus in Makati.

THE PROGRAM

- Offers families pragmatic tools and leading practices to explore the rewards, challenges, goals, and strategies for the long-term survival of their family businesses
- Provides a safe forum, a shared language, and useful frameworks for senior generation and next generation family members to discuss their future goals and plans for their business, ownership, wealth, and family
- Helps family members who are contemplating their career path to understand where they may fit in the family enterprise and how to develop themselves for future roles in governance, ownership, or management
- Offers the unique opportunity to exchange experiences and strategies with like-minded families facing similar situations

TOPICS COVERED

- Multigenerational Success Factors
- Stages of Evolution of Family Businesses
- Governance
- Succession Planning
- Development of the Next Generation
- Preparation for becoming a Shareholder
- Additional related topics

We encourage at least four (4) members of the family to attend, with members representing the senior generation and the next generation, to maximize our discussions and learning on family businesses. Participants do not need management experience or formal business training to participate.

Program fee: USD 6,000 for up to four family members and USD 1,000 for any additional member thereafter

Participants will receive a certificate from the Asian Institute of Management and the Cambridge Institute for Family Enterprise at the end of the program.

SPEAKERS

Dr. John A. Davis

Faculty Director, Family Enterprise programs, M.I.T. Sloan School of Management and Chairman and Founder, Cambridge Family Enterprise Group



Professor John A. Davis is founder and chairman of Cambridge Family Enterprise Group, a global organization he created in 1989 that is devoted to helping families achieve long-term and lasting success for their families, enterprises, and financial wealth. It is comprised of two divisions: Cambridge Advisors to Family Enterprise, a highly specialized, international advisory firm serving family enterprises, and Cambridge Institute for Family Enterprise, a leading education and research institute dedicated to the significant issues that family enterprises face.

Professor Davis is a globally recognized pioneer and authority on issues related to the family enterprise, family wealth, and the family office. Since the 1970s, he has been a leading researcher, author, advisor, and speaker on family enterprise and is the creator of some of the field's most impactful conceptual frameworks. In more than 65 countries, including a number of the world's leading business families, Professor Davis has advised multigenerational family enterprises on long-term sustainability; governance; family wealth; family office; ownership strategies; developing next generation talent; succession transitions; life and career planning; conflict resolution and family unity; selling the family business; and adapting to disruptive change, among others.

A renowned academic and shaper of the family enterprise field, Professor Davis leads the family enterprise suite of programs at the MIT Sloan School of Management. He teaches family business and family office management as well as strategies for family enterprises to position themselves for the future. He leads two executive programs: Future Family Enterprise: Sustaining Multigenerational Success and Founder to Family: Succeeding the Founder in the Family Enterprise.

Professor Davis earned his Doctorate in Business Administration from Harvard Business School, his M.A. in Economics from the University of Wisconsin, and his A.B. in Economics with high honors from Kenyon College.

Maria Sinanis

Senior Advisor and Partner, Cambridge Family Enterprise Group



Maria Sinanis is a senior advisor, partner, and fellow at Cambridge Advisors to Family Enterprise, a leading education and research institute dedicated to the significant issues family enterprises face.

Since 2007, Ms. Sinanis has advised multigenerational family-owned enterprises of diverse sizes, generations, and industries throughout North America, Latin America, and Africa. She assesses the performance of family enterprise systems; advises on best practices; designs and implements governance structures for the family, owners, and business; facilitates governance meetings and leads families through governance and process issues; guides next-generation family members to prepare them for future roles; and, addresses family relationship challenges.

For several years, Ms. Sinanis served as a facilitator at Harvard Business School's Families in Business program. She is co-author of two books on family business and contributes to research pertaining to next generation development at the Cambridge Institute for Family Enterprise.

Ms. Sinanis earned her M.B.A. from Babson College in Massachusetts. She earned her B.A., with a double major in Education and Hispanic Language and Literature and a minor in Business, from Kalamazoo College in Michigan. She is certified to administer and interpret the Myers Briggs Type Indicator instrument. She is fluent in English, Greek, and Spanish and has a basic level of fluency in Portuguese.

Marlon Young

Senior Advisor and Associate Partner, Cambridge Family Enterprise Group



Marlon Young is senior advisor and associate partner at Cambridge Advisors to Family Enterprise, a highly specialized international advisory firm serving family enterprises.

Based in New York, Mr. Young advises multigenerational family enterprises of diverse sizes, generations, and industries throughout North America, South America, and Asia. He assists family enterprises and family offices in achieving their family, ownership, and organizational goals, with emphasis on sibling partnerships and cousin consortium stage enterprises. This includes advising on wealth and portfolio diversification strategies; how families select financial service providers; effective governance throughout the family enterprise, succession planning, and preparation of the next generation. A seasoned banker experienced in advising entrepreneurs and business owners, he helps families unlock opportunity for family enterprise systems in an integrated fashion across family, business, ownership and wealth issues.

For more than 35 years, he held executive positions at two of the world's largest banks where he grew and led multiple areas of the banks, transformed a number of significant businesses, led global teams, and developed innovative initiatives to better serve clients. For 11 years, Mr. Young was CEO and Regional Head of HSBC Global Bank – Americas. Previously, he held leadership roles at Citigroup for 25 years, including at Citi Private Bank, Citicorp Real Estate Group, Citibank Corporate Bank, and Smith Barney. His international banking experience included leadership positions based in the Philippines, Hong Kong, and Singapore.

Mr. Young earned his M.B.A. from the Asian Institute of Management in the Philippines and his B.S. in education from the University of South Dakota. He is fluent in English and Tagalog, speaks Hokkien Chinese, and has a basic level of fluency in Mandarin.