

GGI WEBINAR | YOUR FAMILY OFFICE: OPTIMIZING OPERATIONS & OPPORTUNITIES

Tuesday, 16 June 2020, 10:00 AM CDT (Central Daylight Time); 17:00 PM CEST (Central European Summer Time)

Speakers: James P. Martin, Blair Feldman & Guest Speaker Alexandre Monnier



The family office provides tailored wealth management solutions while promoting and preserving the identity and values of the family. Like other businesses, the COVID crisis impacted operations and will present challenges and opportunities in the future.

In this session, we will discuss considerations in optimizing family operations, including investment management, strategic opportunities and operating protocols, as well as additional changes to be considered to formalize new process workflows.

James P. Martin, CMA CIA CFE (from GGI member firm Cendrowski Corporate Advisors LLC in Bloomfield Hills, MI, USA), specializes in providing comprehensive risk assessments, focusing on the evaluation of operating effectiveness of business processes, internal control structures, and the development of recommendations for improvement.

Blair Feldman is Director of Family Office at GGI member firm Prager Metis CPAs (part of GGI member Prager Metis International). Blair has over 12 years of experience serving high-net-worth individuals. Blair's expertise is in helping high-net-worth individuals and families protect, preserve, and grow their wealth.

Guest Speaker **Alexandre Monnier** is Senior Vice President and Managing Director of Wealth Sustainability, and President of the Hawthorn Institute for Family Success. Alexandre has extensive experience understanding and serving ultra-high net worth families, and his role is not only to help prepare wealth for families, but also to prepare families for their wealth.

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