



SCHOOL OF EXECUTIVE EDUCATION  
AND LIFELONG LEARNING

CAMBRIDGE  
INSTITUTE FOR FAMILY ENTERPRISE

## TOP MANAGEMENT PROGRAM

# Multigenerational Family Business

The Top Management Program - Multigenerational Family Business is devoted to helping business families gain the knowledge and practices to successfully steward their family companies into the next generation.

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

An optional third day on March 25 offers private consultations with faculty, who advise business families around the world, for families who want to receive customized guidance about their situation. This will be held at the Asian Institute of Management campus.

### Topics Covered:

Multigenerational Success Factors; Stages of Evolution of Family Businesses; Governance; Succession Planning; Development of the Next Generation; Preparation for becoming a Shareholder; and related topics. This program combines classroom discussions, interactive lectures, case discussions, and international examples.

In particular, 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 business.
- 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.

### Who Should Attend:

Families must attend in groups, with members of both the senior generation and next generation. Individuals may not attend alone; at least two people from each family should attend. Participants do not need management experience or formal business training to participate.



### Program Dates

23-24 March 2020

Ballroom 1, Fairmont Hotel  
Makati City, Philippines

### Program Cost

USD 6,000 for a family of four members, and  
USD 1,000 for any additional family member

### Your Program Faculty



#### Dr. John A. Davis

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



#### Maria Sinanis

Senior Advisor and Partner,  
Cambridge Family Enterprise Group



#### Marlon Young

Senior Advisor and Associate Partner,  
Cambridge Family Enterprise Group

### Registration and Inquiries

To register, please accomplish the  
Registration and Pre-Program Survey Form  
at <http://bit.ly/2SiG7Xn>.

For other inquiries, please contact  
Jeanette Español at [JEspanol@aim.edu](mailto:JEspanol@aim.edu)  
or +63917-5014638.



# 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. His insights help to build shareholder value, develop leaders, strengthen families, professionalize businesses and family offices, and pass sustainable enterprises to the next generation.

Trained in management, psychology, and economics, Professor Davis has advised multigenerational family enterprises in more than 65 countries, including a number of the world's leading business families. He advises 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, and 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. During his 21 years on the faculty of Harvard Business School, Professor Davis founded and led Harvard's family business management area and was founding faculty chair of the Families in Business program. He also taught the MBA course, Management of the Family Business, and family business management in the Owner/President Management executive program.

Professor Davis speaks at conferences and workshops for business families around the world, such as for the World Economic Forum, Harvard Business Review, YPO and WPO, Cambridge Institute for Family Enterprise, Family Business Network, as well as for financial institutions, private member networks, and individual family companies.

Professor Davis has written significant works explaining family enterprise dynamics and has created many of the leading conceptual frameworks in the field. His most known contribution is the Three-Circle Model of the Family Business System, the fundamental paradigm in the field which he created with HBS Professor Renato Tagiuri. He also co-authored *Generation to Generation: Life Cycles of the Family Business*, a preeminent work. His extensive body of educational materials is used by graduate schools of business around the globe. He is regularly cited in publications such as the Wall Street Journal, New York Times, Financial Times, Economist, Bloomberg, NPR, Forbes, and Fortune.

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.

Follow Prof. John A. Davis on Twitter at [@ProfJohnDavis](https://twitter.com/ProfJohnDavis), and learn more about his activities at [www.johndavis.com](http://www.johndavis.com).



# Maria Sinanis

Senior Advisor and Partner, Cambridge Family Enterprise Group

Maria Sinanis is a senior advisor and partner at Cambridge Advisors to Family Enterprise, a highly specialized international advisory firm serving family enterprises. She is a fellow at Cambridge Institute for Family Enterprise, a leading education and research institute dedicated to the significant issues family enterprises face. Both organizations are divisions of Cambridge Family Enterprise Group, a global organization founded in 1989, devoted to helping families achieve multigenerational success for their families, enterprises, and financial wealth.

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. Her advisory work primarily focuses on next generation talent development and assisting cousin-owned, complex family enterprises with architecting and implementing tailored governance systems to keep the family and owners united and connected to the business and family office. In 2010, the Family Firm Institute—the preeminent association for family enterprise professionals—awarded Ms. Sinanis certification in Family Business Advising.

Ms. Sinanis teaches and speaks to family business audiences at education programs and private family meetings. She teaches in the Preparing Owners of a Family Business program at the Cambridge Institute for Family Enterprise. She is a facilitator in the Future Family Enterprise: Sustaining Multigenerational Success program at the MIT Sloan School of Management, an innovative new program for multigenerational families to prepare themselves for the future. 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: *Next Generation Success* (Cambridge Institute for Family Enterprise, 2014) and the forthcoming book *Understanding the Power of Ownership: A Guide to the Responsibilities and Rights of Family Enterprise Ownership* (Cambridge Institute for Family Enterprise, to be published soon). She contributes to research pertaining to next generation development at the Cambridge Institute for Family Enterprise.

Earlier in her career, Ms. Sinanis was a director of business development in her family's second-generation family business, a manufacturer and tier one and two supplier to the automotive and agriculture industry. She also worked as an advisor, with a focus in strategy implementation, for The Telos Group, a boutique consulting firm that provides advisory services to family and closely held companies.

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.

Contact Ms. Sinanis at [msinanis@cfeg.com](mailto:msinanis@cfeg.com).



# 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. Cambridge Advisors and Cambridge Institute for Family Enterprise, an education and research institute, are divisions of Cambridge Family Enterprise Group, a global organization founded in 1989. It is devoted to helping families achieve multigenerational success for their families, enterprises, and financial wealth.

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 partnership 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.

Mr. Young has spent his international career in the financial services industry with experience in private banking, corporate banking, and wealth management. 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 Private 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.

Contact Mr. Young at [myoung@cfeg.com](mailto:myoung@cfeg.com).