

WHAT'S ON AT FBA

# ADVISOR 2026 CALENDAR

Explore Family Business Association Events,  
Education Courses and Programs on offer in 2026





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All details provided in the calendar are subject to change

## Australia

NATIONAL GOLD PARTNERS

20 Years

EWM GROUP

KPMG

Gallagher

Insurance | Risk Management | Consulting

NATIONAL BANKING PARTNER

ANZ

NATIONAL TECHNOLOGY PARTNER

PRONTO

SOFTWARE

NATIONAL WORKPLACE COMPLIANCE PARTNER

Citation Group

## New Zealand

NATIONAL GOLD PARTNERS

KPMG

Gallagher

INSURANCE

NATIONAL SILVER PARTNER

JACKSON RUSSELL

NATIONAL BANKING PARTNER

ANZ PRIVATE

## CEO MESSAGE

I'm delighted to share FBA's full year calendar of events and education for our Advisor members. This is your first look at what's in store throughout 2026 to start planning your year with FBA. From time to time we will include some additional opportunities to add more value to members. 2026 is another year filled with opportunities for networking, learning, and growth with our family business advisor community, and of course some fun along the way.

Our calendar includes events of all shapes and sizes, from our flagship Family Business Conference: Asia-Pacific to local networking events. Many of our events, such as Advisor Connect, Meet the Owner, After 5, Economic Breakfast and Celebrate are included in your FBA membership and I encourage you to take advantage of them. We are also supporting two masterclasses exclusively for our advisors across 2026. All FBA events provide a great opportunity to expand your network, find new clients and collaborators, and connect with peers who are navigating through the same nuances and challenges of supporting family businesses.

Mark your calendars for the Family Business Conference 2026: Asia-Pacific held at the Hotel Grand Chancellor Hobart on 19 – 22 May. It's an event you won't want to miss. Plus, our Family Business Insights Conferences taking place in September and October across Australia and New Zealand.

Our Advisor Accreditation Program is specifically designed to equip you with the skills, knowledge, and tools needed to effectively support family businesses. Our Advising Business Families is an advisor-focused course to differentiate yourself and better guide family business clients toward success.

When you look at what we have planned in 2026, we are living our values – One Family, Supporting our Members to Thrive, Being Authentic and having a Learning Mindset.

Please explore everything we have on offer, mark your diaries and register your spot. We look forward to seeing you at our events and programs throughout 2026.

Warm regards,

CATHERINE SAYER  
CEO, Family Business Association

2 FAMILY BUSINESS ASSOCIATION

ADVISOR EVENTS AND EDUCATION CALENDAR 2026 3



# Next is *Now*

**REGISTER NOW**

## Next is Now

The steps you take today are shaping the future of your family business.

Next is Now highlights the opportunity to prepare for what's ahead, while recognising that transition, innovation and generational shifts are already underway.

At the Family Business Conference 2026: Asia-Pacific in Hobart, you will explore what this means for your business; whether you are navigating succession, driving growth and expansion, setting up governance structures, or empowering your emerging leaders.

This year's conference will motivate you to act with foresight, document your strategy and embrace change - not later, but now.

*Because your next chapter is already being written.*

**LEARN MORE**

## Come for the insights, stay for the conversations and leave feeling part of something bigger!

Now in its 26th year, the Family Business Conference: Asia-Pacific is heading to Hobart in 19 - 22 May 2026. We'll be right in the heart of the action at the Hotel Grand Chancellor, just a stone's throw from Hobart's city centre and surrounded by breathtaking natural beauty, delicious local produce, and the rich heritage Tasmania is famous for.

The Family Business Conference is designed specifically for you, bringing together approx. 500 family business leaders and advisors from across Australia, New Zealand and the Asia-Pacific region.

This is the only conference dedicated exclusively to family businesses in the Southern Hemisphere, offering 4-days of keynote sessions, masterclasses, workshops family business site visits, social events and tours.

Every moment is tailored to family business and designed to support you to build networks, take home tangible learnings and be a part of a truly welcoming and supportive community who understand the complexities and opportunities of working with family.



**LEARN FROM  
EXPERTS**



**CONNECT  
WITH PEERS**



**EXPAND YOUR  
NETWORK**



**EXPERIENCE  
'MAGIC DUST'**



**SPARK  
NEW IDEAS**



**HAVE A  
GREAT TIME**

“

It was an amazing conference of wonderful storytelling. The honesty of it all. I loved every moment.”

Rona Biernat, Freedom Pools & Spas

“

I loved being with like-minded people who get the issues of being in a family business. I loved hearing the highs, the lows, and the learnings, which I will be implementing into our family business.”

Despina Voudouris, T & C Investments Pty Ltd

“

I loved witnessing and being a part of the amazing community created by FBA. After meeting people on the first day they soon felt like old friends. And listening and learning alongside my uncle has been an amazing experience.”

Ashlee Brien, Sherkane Pty Ltd







## Family Business Award Categories

**Founder's  
Family  
Business**

**Established  
Family  
Business**

**Legacy  
Family  
Business**

**Family  
Business  
of the Year**

## Individual Award Categories

**Accredited  
Advisor  
of the Year**

**Emerging  
Leader  
in Family  
Business**

**Leading  
Woman  
in Family  
Business**

[LEARN MORE](#)

## Tell Your Story. Be Recognised. Grow Through the Process.

- Be recognised for your hard work and success, showcase your achievements and tell your family business story.
- Benchmark yourself against peers and receive detailed feedback from our expert judging panel to help you grow - whether you win or not.
- Gain visibility through state and national events, and be splashed across FBA communications celebrating your award win.

Applications for the 2026/2027 Family Business Excellence Awards open in May 2026. Keep an eye out...

## Celebrating Excellence in Family Business since 1999.

FBA celebrates success in family business through the Family Business Excellence Awards. Recognising the passion, legacy and innovation of family businesses across Australia and New Zealand.

The Family Business Excellence Awards recognise and celebrate the achievements of families and individuals in respected and successful family businesses of all sizes and at all stages, acknowledging the significant contribution they make to the Australian and New Zealand social fabric and economy.

Unlike many other business awards, the Family Business Excellence Awards acknowledge and showcase excellence across the family business sector. Whether you're a first or multi-generation family business, an emerging leader, female trailblazer, or a trusted advisor helping family businesses thrive, there is a category for you to showcase your excellence.



ADVISOR CONNECT

MEET THE OWNER

AFTER 5 CONNECT

ECONOMIC OUTLOOK BREAKFAST

CELEBRATE

FAMILY BUSINESS INSIGHTS CONFERENCE

# EVENTS

FBA events are designed to bring together the advisor and family business community. Whether you're looking to connect with like-minded peers, continue your professional development, build your network of clients and collaborators, or celebrate the achievements of the family business sector, FBA's events program offers something for everyone. Our annual Family Business Insights Conferences, and Economic Breakfast events co-hosted with ANZ, deliver thought-provoking perspectives from industry leaders and subject matter experts in your state/region, Advisor Connects provide a platform to learn and collaborate with your peers across disciplines, Meet the Owner events allow you to hear directly from family businesses, while events like After 5 Connect and Celebrate bring the community together to connect, network and enjoy each other's company.







# ADVISOR CONNECT

INCLUDED IN YOUR FBA MEMBERSHIP

Advisor Connects bring FBA advisors together for meaningful collaboration, learning, and networking. These events provide an invaluable opportunity to connect with like-minded peers, expand your understanding of other disciplines, and discover ways to work together to better serve family business clients.

As a trusted advisor to family businesses, you understand the complexities and nuances of this unique sector. Advisor Connect events are designed to enhance your knowledge, broaden your professional network, and create opportunities for collaboration. Each session features a key topic and an expert speaker, equipping you with practical insights to support family businesses through growth, transitions, succession and more.

These events also foster connections with fellow advisors across disciplines, helping you deepen your understanding of their expertise and uncover collaborative opportunities. By engaging with a supportive and knowledgeable community, you'll keep abreast of best practices and strengthen your ability to support your family business clients.

## WHY ATTEND?

Network with like-minded professionals who understand the family business sector.

Gain insights from expert speakers on topics relevant to advising family businesses.

Explore collaboration opportunities to enhance the services you offer.

Stay ahead of best practice in advising family businesses.

Be part of a trusted, supportive community dedicated to helping family businesses thrive.

## Advisor Connect Events

Below, you'll find all the dates and local times for upcoming Advisor Connects across Australia and New Zealand. Simply click on the date to find out more details and register your spot.

### New South Wales and ACT

In-Person - Sydney CBD

Thursday 12 February, 7:30am - 9:00am  
Thursday 12 March, 7:30am - 9:00am  
Thursday 9 April, 7:30am - 9:00am  
Thursday 14 May, 7:30am - 9:00am  
Thursday 11 June, 7:30am - 9:00am  
Thursday 9 July, 7:30am - 9:00am  
Thursday 13 August, 7:30am - 9:00am  
Thursday 10 September, 7:30am - 9:00am  
Thursday 8 October, 7:30am - 9:00am  
Thursday 12 November, 7:30am - 9:00am

Hybrid - Parramatta

Wednesday 25 February, 7:30am - 9:00am  
Wednesday 25 March, 7:30am - 9:00am  
Wednesday 22 April, 7:30am - 9:00am  
Wednesday 27 May, 7:30am - 9:00am  
Wednesday 24 June, 7:30am - 9:00am  
Wednesday 22 July, 7:30am - 9:00am  
Wednesday 26 August, 7:30am - 9:00am  
Wednesday 23 September, 7:30am - 9:00am  
Wednesday 28 October, 7:30am - 9:00am  
Wednesday 25 November, 7:30am - 9:00am

### Queensland

Hybrid - Brisbane CBD

Wednesday 11 February, 12:00pm - 1:30pm  
Wednesday 11 March, 12:00pm - 1:30pm  
Wednesday 15 April, 12:00pm - 1:30pm  
Wednesday 13 May, 12:00pm - 1:30pm  
Wednesday 10 June, 12:00pm - 1:30pm  
Wednesday 8 July, 12:00pm - 1:30pm  
Wednesday 19 August, 12:00pm - 1:30pm  
Wednesday 9 September, 12:00pm - 1:30pm  
Wednesday 14 October, 12:00pm - 1:30pm  
Wednesday 11 November, 12:00pm - 1:30pm

### South Australia and NT

Hybrid - Adelaide

Tuesday 10 February, 12:30pm - 2:00pm  
Tuesday 10 March, 7:30am - 9:00am  
Tuesday 14 April, 12:30pm - 2:00pm  
Tuesday 12 May, 7:30am - 9:00am  
Tuesday 16 June, 12:30pm - 2:00pm  
Tuesday 21 July, 12:30pm - 2:00pm  
Tuesday 18 August, 12:30pm - 2:00pm  
Tuesday 15 September, 12:30pm - 2:00pm  
Tuesday 20 October, 7:30am - 9:00am  
Tuesday 17 November, 5:30pm - 7:00pm

### Victoria and Tasmania

Hybrid - Melbourne CBD

Tuesday 17 February, 7:30am - 9:00am  
Tuesday 17 March, 7:30am - 9:00am  
Tuesday 21 April, 7:30am - 9:00am  
Tuesday 26 May, 5:00pm - 6:30pm  
Tuesday 16 June, 7:30am - 9:00am  
Tuesday 21 July, 7:30am - 9:00am  
Tuesday 18 August, 7:30am - 9:00am  
Tuesday 15 September, 7:30am - 9:00am  
Tuesday 20 October, 5:00pm - 6:30pm  
Tuesday 17 November, 7:30am - 9:00am

### Western Australia

Hybrid - Perth CBD

Tuesday 17 February, 7:30am - 9:00am  
Wednesday 18 March, 7:30am - 9:00am  
Tuesday 21 April, 7:30am - 9:00am  
Wednesday 13 May, 7:30am - 9:00am  
Tuesday 16 June, 7:30am - 9:00am  
Wednesday 15 July, 7:30am - 9:00am  
Tuesday 18 August, 7:30am - 9:00am  
Wednesday 16 September, 7:30am - 9:00am  
Tuesday 20 October, 7:30am - 9:00am  
Wednesday 18 November, 7:30am - 9:00am

### Auckland

Hybrid - Auckland CBD

Wednesday 21 January, 7:30am - 9:00am  
Wednesday 18 March, 7:30am - 9:00am

Wednesday 13 May, 7:30am - 9:00am

Wednesday 15 July, 7:30am - 9:00am

Wednesday 16 September, 7:30am - 9:00am

Wednesday 18 November, 7:30am - 9:00am





# MEET THE OWNER

## INCLUDED IN YOUR FBA MEMBERSHIP

Get an exclusive, behind-the-scenes look at a local family business at Meet the Owner. These businesses will open their doors to you, giving you the opportunity to hear directly from the family, tour their facility and gain insight into the systems, values and decisions that have shaped their ongoing success.

Meet the Owner invites you to experience the inner workings of a family business in your area. Depending on the business, you may explore a factory, winery or warehouse, sample their products and learn about their processes behind the scenes. The event also includes a Q&A panel session, offering a unique window into the experiences of the family behind the business. You will hear about their history, the challenges they have navigated and the achievements that brought them to where they are today, along with insights you can take back to your own business.

After the tour and Q&A, enjoy time to network with the family business community, meet someone new or catch up with familiar faces, and share a few insights while they are still fresh.

## WHY ATTEND?

Gain exclusive insights into the operations of a successful family business.

Learn first-hand from the family behind the business about their opportunities and challenges.

Expand your network within the FBA community and enjoy a relaxed environment for learning, sharing, and connecting.

Find inspiration and practical ideas for your own business.

## Meet the Owner Events

 Special Meet the Owner event for National Family Business Day

Below, you'll find the dates and locations for upcoming Meet the Owner events across Australia and New Zealand. Simply click on the date that suits you best to find out more details and register your spot. If you see this symbol, **SD**, please save the date, bookings are not open yet.

### New South Wales and ACT

 De Lorenzo Hair - Silverwater  
Thursday 17 September, 5:00pm - 8:00pm

More to come...

### Queensland

Green RV - Forest Glen  
Thursday 26 March, 5:00pm - 7:00pm

 O'Brien Energy - Heathwood  
Thursday 17 September, 5:30pm - 7:30pm

More to come...

### South Australia

Kytos Bakery - Edwardstown  
Tuesday 24 February, 6:00pm - 8:00pm

Blackman Recruitment - North Adelaide  
Tuesday 28 July, 6:00pm - 8:00pm

More to come...

### Victoria

Hargo Engineering - Croydon  
Thursday 23 April, 8:30am - 10:30am

Cold Xpress - Rowville  
Thursday 16 July, 5:30pm - 7:30pm

 Australian Paper Recovery - Truganina  
Friday 18 September, time details to come...

### Western Australia

Novata Solutions - East Perth  
Thursday 30 April, 10:00am - 12:00pm

Retravisin Cannington - Cannington  
Wednesday 29 July, 6:00pm - 8:00pm

More to come...

### Tasmania + Northern Territory

We are looking forward to bringing events to Hobart and Darwin in the near future.

Keep an eye out for details of local events. Stay tuned...

### Auckland

TPT Group Holdings - Auckland  
Tuesday 21 April, 5:30pm - 7:30pm

 Jacobsen Holdings - Auckland  
Thursday 13 August, 5:30pm - 7:30pm

 St Pierre's International - Auckland  
Thursday 17 September, 5:30pm - 7:30pm

More to come...

### Canterbury

Road Metals - Christchurch  
Thursday 19 March, 4:00pm - 6:30pm

Service Foods - Christchurch  
Thursday 11 June, 5:30pm - 7:30pm

 Heartland Chips - Timaru  
Thursday 13 August, 4:30pm - 6:30pm

### Wellington

PARKS Towing - Wellington  
Thursday 25 June, 4:30pm - 6:30pm

More to come...

### Hamilton

Watch this space for a Meet the Owner event coming to Hamilton in 2026.

Details to come...





# AFTER 5 CONNECT

## INCLUDED IN YOUR FBA MEMBERSHIP

**Unwind after a busy day at After 5 Connect. Come along and have a chat with other family businesses and advisors from across the FBA community.**

Join us at a local spot and catch up with people who understand the ups and downs of working in, and with, family businesses. There's no formal agenda, just a welcoming, easy-going space to chat, share experiences, and exchange ideas.

These evenings are all about meeting new people, learning from each other in great company. You might pick up new ideas, meet a new customer or collaborator from the family business sector, or find common ground to help you in your business.

Whether you've been part of FBA for years or you're just starting to get involved, After 5 Connect is a great way to expand your network and end the day with good company and great conversation.

## WHY ATTEND?

Connect with fellow FBA members in a relaxed setting.

Share insights, experiences, and challenges with people who truly understand family business.

Strengthen your local network and meet potential customers and collaborators.

Enjoy a welcoming environment for open and meaningful conversations in a supportive community.

## After 5 Connect Events

Below, you'll find the dates and locations for upcoming After 5 Connect events across Australia. Simply click on the date that suits you best to find out more details and register your spot.

### New South Wales and ACT

Verandah Bar - Sydney CBD  
Thursday 19 February, 5:00pm - 8:00pm

Albion Hotel - Parramatta  
Thursday 26 March, 5:15pm - 8:00pm

Ryan's Bar - Sydney CBD  
Thursday 8 October, 5:00pm - 9:00pm

### Queensland

Antico Bar - Brisbane CBD  
Thursday 26 February, 4:30pm - 6:30pm

Mano's Tedder Avenue - Main Beach  
Friday 26 November, 5:30pm - 7:30pm

### South Australia

Strathmore Hotel - Adelaide CBD  
Wednesday 18 March, 5:00pm - 7:00pm

Bar Torino - Adelaide CBD  
Wednesday 17 June, 5:00pm - 7:00pm

### Victoria

St Andrew's Hotel - Fitzroy  
Thursday 26 February, 5:00pm - 7:00pm

Gold Diggers Arms - Geelong  
Wednesday 25 March, 5:00pm - 7:00pm  
**Special Introduction to FBA Event**

The Juke Bar, Grovedale Hotel - Geelong  
Thursday 12 November, 5:00pm - 7:00pm

### Western Australia

Pinot & Picasso - Perth CBD  
Wednesday 25 February, 6:00pm - 8:00pm  
**Paint and Sip included, thanks to Vitalis Legal**

Gage Roads - Fremantle  
Thursday 25 June, 5:30pm - 7:30pm

### Tasmania + Northern Territory

We are looking forward to bringing events to Hobart and Darwin in the near future.

Keep an eye out for details of local events. Stay tuned...





# ECONOMIC OUTLOOK BREAKFAST

INCLUDED IN YOUR FBA MEMBERSHIP

Join family business owners, executives and advisors across Australia for a family business-specific economic update, presented in collaboration with ANZ. Held over breakfast, this event offers an opportunity to engage with like-minded peers, and hear key insights on the economy and geopolitics.

An opportunity for family businesses and advisors to come together and discuss the economic landscape, identify emerging opportunities, and navigate the challenges unique to family businesses. With expert insights from industry leaders and ANZ economists and geopolitical experts, you'll gain practical knowledge that can help guide strategic decisions for the year ahead.

This event is a must for anyone in family business or advisory roles looking to understand the latest economic trends while connecting with others who truly understand the nuances of family business.

## WHY ATTEND?

Gain valuable insights into the economic and geopolitical outlook ahead.

Connect with family business peers and advisors in a collaborative environment.

Stay informed on key family business topics, fostering better decision-making and planning.

Expand your network and exploring opportunities for future collaboration.

## Economic Outlook Breakfast Events

Below, you'll find the dates for upcoming Economic Outlook Breakfast events across Australia, and a Post Budget Breakfast in New Zealand. Simply click on the date that suits you best to find out more details and register your spot. If you see this symbol, **SD**, please save the date, bookings are not open yet.

### New South Wales

**SD** Sydney - Location TBC  
Thursday 13 August

### Queensland

**SD** Brisbane - Location TBC  
Thursday 6 August

### South Australia

**SD** Adelaide - Location TBC  
Thursday 20 August

### Victoria

**SD** Melbourne - Location TBC  
Thursday 23 July

### Western Australia

**SD** Perth - Location TBC  
Thursday 27 August

### Auckland

## Post Budget Event

ANZ Centre, Auckland  
Date details coming soon...

Join us in Auckland for a post-budget briefing. A key government minister will join us to share insights on the Government's fiscal decisions and their impact on family businesses and the New Zealand economy. This event offers a valuable opportunity to gain insider perspectives, ask questions, and network with peers.





# CELEBRATE END-OF-YEAR EVENT

## INCLUDED IN YOUR FBA MEMBERSHIP

End the year on a high at Celebrate, your end-of-year FBA event! Family businesses, advisors and everyone in the FBA community are invited to enjoy delicious canapés, recognise the year's achievements and celebrate together.

Close out the year by acknowledging everything you've achieved personally and what the family business sector has achieved over the past 12 months. Hear what others in the sector have accomplished, share your own highlights of 2026, and enjoy each other's company.

The FBA team will kick things off with a short recap of the year, and then it's over to you to celebrate the evening how you choose. Catch up with old friends, make some new connections and enjoy a night surrounded by the family business community to close out the year.

## WHY ATTEND?

Celebrate the achievements of the family business sector and FBA from the year.

Enjoy delicious canapés and drinks while wrapping up the year with like-minded peers.

Reflect on your own business' successes for the year, connecting with peers and sharing stories.

Strengthen relationships within the family business community.

## Celebrate End-Of-Year Events

Below, you'll find the dates and locations for upcoming Celebrate events across Australia and New Zealand. Simply click on the date that suits you best to find out more details and register your spot. If you see this symbol, **SD**, please save the date, bookings are not open yet.

### New South Wales and ACT

Swaab - Sydney CBD  
Thursday 26 November, 5:00pm - 9:00pm  
*Sponsored by Swaab*

### Queensland

The Lord Stanley Hotel - East Brisbane  
Thursday 19 November, 5:30pm - 8:00pm

### South Australia and NT

Details to come...

### Victoria and Tasmania

Royal Saxon - Richmond  
Thursday 26 November, 5:30pm - 8:30pm

### Western Australia

Blasta Gastrobrewery - Burswood  
Thursday 3 December, 6:00pm - 8:00pm

### New Zealand

The Northern Club - Auckland Central  
Tuesday 17 November, 5:30pm - 7:30pm  
*Sponsored by Jackson Russell*  
  
Hotel Montreal - Christchurch  
Thursday 19 November, 5:30pm - 7:30pm  
*Sponsored by Patterson Hospitality*





# FAMILY BUSINESS INSIGHTS CONFERENCE

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

Immerse yourself in this half-day premier event as you connect, share and grow with your peers. Throughout this unrivalled conference program you will be inspired by high calibre speakers and keynote presentations, all with a family business lens.

The Family Business Insights Conference brings local family business communities together across Australia and New Zealand for learning and networking. The program features expert speakers exploring key business and family business topics, blending expert insights with personal success stories.

The day begins with a delicious 2-course lunch while we announce the winners of the Australian State and New Zealand Family Business Excellence Awards for 2026/27. After an afternoon of thought-provoking sessions, the event finishes with networking drinks, offering a great opportunity to connect with peers.

This event is a must-attend for those looking to gain fresh perspectives, spark new ideas and connect with like-minded peers across the family business sector.

## WHY ATTEND?

Gain valuable insights from industry leaders and family business stories.

Celebrate the achievements of our Family Business Excellence Award winners 2026/27.

Enjoy a delicious lunch while building meaningful connections.

Expand your knowledge, challenge your thinking and take new ideas back to your business.

## New South Wales and ACT

Tuesday, 27 October  
11:30am - 6:00pm  
Sydney

Save the Date

## Queensland

Tuesday, 13 October  
11:30am - 6:00pm  
The Emporium, Brisbane

Save the Date

## South Australia and NT

Friday, 30 October  
11:30am - 6:00pm  
Marriott Hotel, Adelaide

Save the Date

## Victoria and Tasmania

Wednesday, 7 October  
11:30am - 6:00pm  
Melbourne

Save the Date

## Western Australia

Tuesday, 20 October  
11:30am - 6:00pm  
Aloft, Perth

Save the Date

## New Zealand

Thursday, 15 October  
11:30am - 6:30pm  
Akarana Marine Sports Centre, Auckland

Save the Date



ADVISOR ACCREDITATION PROGRAM  
ADVISING BUSINESS FAMILIES  
PART 1 + PART 2

ADVISOR MASTERCLASS: BRIDGING  
THE SUCCESSION TRANSITION GAP  
WITH DR DENNIS JAFFE

ACCREDITED ADVISOR MASTERCLASS  
SERIES: GENERATIONAL WEALTH TRANSFER

# EDUCATION

FBA's Accredited Advisor Program and Masterclasses are specifically designed to equip advisors with the skills, knowledge, and tools needed to effectively support family businesses. Our program provides specialised insights into the unique challenges, dynamics, and opportunities within the family business sector, enabling you to deliver greater value to your clients. Whether you're looking to deepen your understanding of family business dynamics, enhance your ability to facilitate succession planning, strengthen governance structures, or refine your communication strategies, we have a course to help elevate your expertise. Explore our advisor-focused course to build credibility, differentiate yourself, and better guide family businesses toward success.





## ADVISOR ACCREDITATION PROGRAM

# ADVISING BUSINESS FAMILIES PART 1 + 2

Upskill and differentiate yourself as a trusted family business advisor through our Advising Business Families course. Delivered in two parts, this program equips you with the essential knowledge, skills, and practical tools to confidently support family businesses navigating growth, succession, and complex dynamics. Complete both parts to become an FBA Accredited Advisor and enhance your value to clients.

The Advising Business Families course, part of FBA's Advisor Accreditation Program, is designed for professionals seeking to deepen their understanding of family businesses.

This two-part program combines foundational knowledge with advanced skills to help you navigate the unique challenges of advising family businesses. Delivered in partnership with the University of Adelaide and led by globally recognised experts, the course blends theory with practical applications to ensure you can deliver tailored, impactful advice to family business clients.

[Find out more](#)

## WHAT'S INCLUDED?

### PART 1

**3 x 2-hour interactive workshops**  
Apply course concepts to family business case scenarios.

**4 x 30 minute pre-recorded lectures**

**4 x online discussion boards**

**Reading resources**

### PART 2

**3 x 2-hour interactive workshops**  
Apply course concepts to family business case scenarios.

**4 x 60 minute pre-recorded lectures**

**4 x online discussion boards**

**Final case study assignment**

**Reading resources**

## Advising Business Families Courses

Below, you'll find all the dates for 2026 Part 1 and Part 2 of Advising Business Families to complete your Advisor Accreditation with FBA. Simply click on the session that suits you best to find out more details and register your spot.

### Part 1

#### March - April 2026

Online Orientation - Tuesday 3 March  
Online Workshop 1 - Tuesday 24 March  
Online Workshop 2 - Tuesday 14 April

#### September - October 2026

Online Orientation - Tuesday 8 September  
Online Workshop 1 - Tuesday 29 September  
Online Workshop 2 - Tuesday 20 October

### Part 2

#### 2-Day Intensive In-Person, Melbourne

Tuesday 21 April, 9:00am - 5:00pm  
Wednesday 22 April, 9:00am - 5:00pm

#### August - September 2026

Online Orientation - Tuesday 4 August  
Online Workshop 1 - Tuesday 11 August  
Online Workshop 2 - Tuesday 1 September  
Online Workshop 3 - Tuesday 22 September

## WHO SHOULD COMPLETE THE COURSE?

This accreditation program is designed for professionals such as accountants, lawyers, business consultants, management consultants, HR specialists, and other advisors who work with or wish to upskill in supporting family businesses.

“

As a Partner with a 25 year corporate career, plus a range of qualifications including an MBA, I wasn't sure how much I'd gain from this course.

Having now completed it, I can categorically state that the outcomes significantly exceeded my expectations. The academic and practical learnings included useful frameworks and family-relevant business models, and the opportunity to interact with family advisors during the course has led to a new network of like-minded advisors across the country.

I highly recommend any advisor dealing with family businesses to seek this accreditation as a priority.

James McGill, Executive Director,  
Chatham Capital Exchange

## KEY LEARNINGS

### Foundational Expertise

Develop essential and advanced skills to effectively advise family businesses.

### Family Dynamics

Understand and navigate complex family relationships within the business environment.

### Communication Strategies

Implement tools to resolve conflicts and improve communication within family businesses.

### Tailored Solutions

Apply proven frameworks and tools to deliver customised, practical solutions for family business clients.

### Competitive Advantage

Build trust and differentiate yourself as a Family Business Accredited Advisor.



## ADVISOR MASTERCLASS

# BRIDGING THE SUCCESSION TRANSITION GAP

WITH DR DENNIS JAFFE

This masterclass is designed to empower experienced advisors with the insights and tools to help clients overcome barriers. Many trusted advisors encounter hurdles when helping business families move from talk to action on succession and transition.

Join Dr Dennis Jaffe, a leading expert and author on family business, as he presents the core ideas from his upcoming working paper, “The Journey to Family Enterprise Succession: Five Steps from Intention to Action,” co-authored with Stacy Allred, Head of Family Engagement & Governance at J.P. Morgan Wealth Management.

Dennis will guide participants through the five key steps — Reflect, Align, Design, Develop, and Execute — that enable families to move from intention to implementation in the transition of current family business leaders and owners.

The workshop will feature a dynamic Q&A and peer problem-solving session that tackles the real-world roadblocks advisors face, particularly when working with founders and first-generation leaders.

Organised and sponsored by the Family Business Education & Research Group (FBERG), Adelaide University. Hosted at KPMG.



### KEY LEARNINGS

A structured, practice-informed process for advancing family enterprise succession and transition.

Practical approaches for engaging wealth creators in meaningful transition conversations.

Shared strategies and peer learning from other experienced advisors.

### WHO SHOULD ATTEND?

Advisors and other professionals, such as accountants, lawyers, business consultants, management consultants, and HR specialists, who work with or wish to upskill in supporting family businesses.

## In-Person Masterclasses

Below, you'll find all the dates and local times for the Bridging the Succession Transition Gap with Dr Dennis Jaffe. Simply click on the session that suits you best to find out more details and register your spot.

### Melbourne

KPMG Docklands  
Friday 24 April, 9:00am - 12:00pm

### Sydney

KPMG Sydney  
Tuesday 28 April, 9:00am - 12:00pm

### Adelaide

KPMG Adelaide  
Thursday 30 April, 9:00am - 12:00pm

### Perth

KPMG Perth  
Tuesday 5 May, 9:00am - 12:00pm



**Dr Dennis Jaffe**  
Senior Research Fellow  
Banyan Global Family Business Advisors

Dr Jaffe is a globally recognised advisor to families about family business, governance, wealth and philanthropy. For over 40 years, Dr Dennis Jaffe, a San Francisco-based advisor, has been one of the leading architects of the field of family enterprise consulting.

[Find out more and register](#)



ACCREDITED ADVISOR MASTERCLASS SERIES:

# GENERATIONAL WEALTH TRANSFER

This program is for FBA Accredited Advisors, who have completed Part 1 and Part 2, and are seeking further professional development.

The largest intergenerational wealth transfer in history is underway, with over \$5 trillion set to pass from the Baby Boomer generation to their heirs. This shift presents both a challenge and an extraordinary opportunity for advisors to elevate their role beyond financial and estate planning.

Today's high-net-worth (HNW) families seek advisors who understand the broader dimensions of family wealth, relationships, values, legacy, and purpose. Delivered by Brad Scott, Institute for Family Wealth, this masterclass series equips advisors to become confident facilitators of these complex, non-financial conversations, helping families prepare heirs and preserve both assets and harmony across generations.

More than just a course, The Great Wealth Transfer is a transformational program that empowers advisors with the mindset, tools, and strategies needed to engage deeply with multigenerational families. Through case studies, facilitated discussions, and ongoing support, participants will gain the insight and confidence to attract new HNW clients, retain existing ones, and differentiate their practice. Advisors will learn to navigate the family dynamics that often derail transitions, and lead meaningful discussions that strengthen trust, unity, and long-term client relationships.

[Find out more and register today](#)

## WHAT'S INCLUDED?

### MASTERCLASS

4 x 3-hour interactive workshops  
All sessions are held online via Zoom

### BUSINESS BUILDING TOOLS

- Collection of Institute for Family Wealth books
- Whitepapers & Articles
- Series of Inheritance Conversation Checklists
- Presentations with Companion Workbooks
- Marketing Resources
- Family Workbook

Delivered by:



## WHO SHOULD ATTEND?

Only available to FBA Accredited Advisors.

This course is designed for Financial Planners, Family Office Executives, Wealth Managers, Estate Planners, Accountants, Trusted Advisors, Bankers, and Lawyers who work with – or want to work with – affluent multi-generational families.

## KEY LEARNINGS

- Understand the key non-financial risks and dynamics in wealth transfer.
- Confidently lead inheritance conversations that unify, rather than divide, families.
- Develop strategies to attract and retain HNW families through generational change.
- Build trust and rapport across multiple generations, including rising generations, and women leaders.
- Learn how to design and facilitate effective family meetings.
- Gain access to turnkey tools including workbooks, checklists, and conversation guides.
- Develop a practical, business-building plan using the Institute for Family Wealth toolkit.
- Earn IMCA and CFP continuing education credits.

## Masterclass Series Session Dates

### Orientation

Wednesday, 5 August  
11:00am - 1:00pm AEST

### Workshop 1

Wednesday, 19 August  
11:00am - 1:00pm AEST

### Workshop 2

Wednesday, 2 September  
11:00am - 1:00pm AEST

### Workshop 3

Wednesday, 30 September  
11:00am - 1:00pm AEST



## THANK YOU TO OUR PARTNERS FOR YOUR ONGOING SUPPORT

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