

WHAT'S ON AT FBA

FAMILY BUSINESS 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 again share FBA's full year calendar of events, education and programs with you. 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 have 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 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 Meet the Owner, Coffee Connect, After 5, ANZ hosted Economic Outlook Breakfast and Celebrate are included in your FBA membership and I encourage you to take advantage of them. All FBA events provide a great opportunity to expand your network, find new collaborators, customers or advisors, and connect with peers who are navigating through the same nuances and challenges of working with family.

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 October across Australia and New Zealand.

I highly recommend exploring our Forum Group Program. A cornerstone of FBA for more than 25 years, the program provides unmatched personal and professional support alongside your peers in family business. We have also launched a 2-year Emerging Leaders Forum Group Program to upskill the next generation of leadership in family business, a great new initiative that has been embraced by our community.

Our education courses are specifically designed and tailored to family businesses. There are in-person, online, hybrid and in-house on-demand courses on offer covering key topics such as Governance, Succession, Strategic Planning, Financial Essentials and now our latest addition, Family Business Dynamics. Of course, included in your membership is the Family Business Essentials Course, which I encourage you to attend if you haven't been previously.

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

FAMILY BUSINESS EVENTS, EDUCATION AND PROGRAM 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.

MEET THE OWNER
COFFEE CONNECT
AFTER 5 CONNECT
ECONOMIC OUTLOOK BREAKFAST
CELEBRATE
FAMILY BUSINESS INSIGHTS CONFERENCE

EVENTS

FBA events are designed to bring together the family business community. Whether you're looking to connect with like-minded peers, build your network of customers and collaborators, learn from industry experts, 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, our Meet the Owner events allow you to learn directly from the experiences of your peers, while events like Coffee Connect, After 5 Connect, and Celebrate bring the community together to connect, network and enjoy each other's company.





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

Retravisio 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...



COFFEE CONNECT

INCLUDED IN YOUR FBA MEMBERSHIP

Start your day with a coffee and good conversation at Coffee Connect. The coffee is on us, come along and have a chat with other family businesses in your local area.

Join us at a local café and meet with others who understand the ups and downs of running a family business. There's no formal agenda, just a welcoming space to chat, share experiences, and swap ideas.

These mornings are all about building new relationships and peer-to-peer learning. You might pick up a new idea, find someone facing similar challenges, or meet a new customer or collaborator from the family business sector.

Whether you've been part of our FBA community for years or you're brand new, Coffee Connect is a great way to expand your family business network.

WHY ATTEND?

Enjoy coffee on us at a local café while meeting other family businesses in your area.

Share stories, challenges and ideas, to learn from people who've been there too.

Find potential customers or collaborators in the family business sector.

Build genuine connections in a welcoming community.

Coffee Connect Events

Below, you'll find the dates and locations for upcoming Coffee 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

Percy Plunkett - Penrith
Wednesday 17 June, 11:00am - 12:30pm

Queensland

Café Catalina - Southport
Wednesday 17 June, 8:30am - 10:00am

Curlys on the Boardwalk - Mount Coolum
Thursday 27 August, 8:30am - 10:00am

South Australia

OAR - West Lakes Shore
Wednesday 29 April, 9:30am - 11:00am

Love your Mamma - Adelaide CBD
Wednesday 19 August, 8:30am - 10:00am

Victoria

University Café - Carlton
Wednesday 17 June, 8:30am - 10:00am

Event in Geelong still to come...

Western Australia

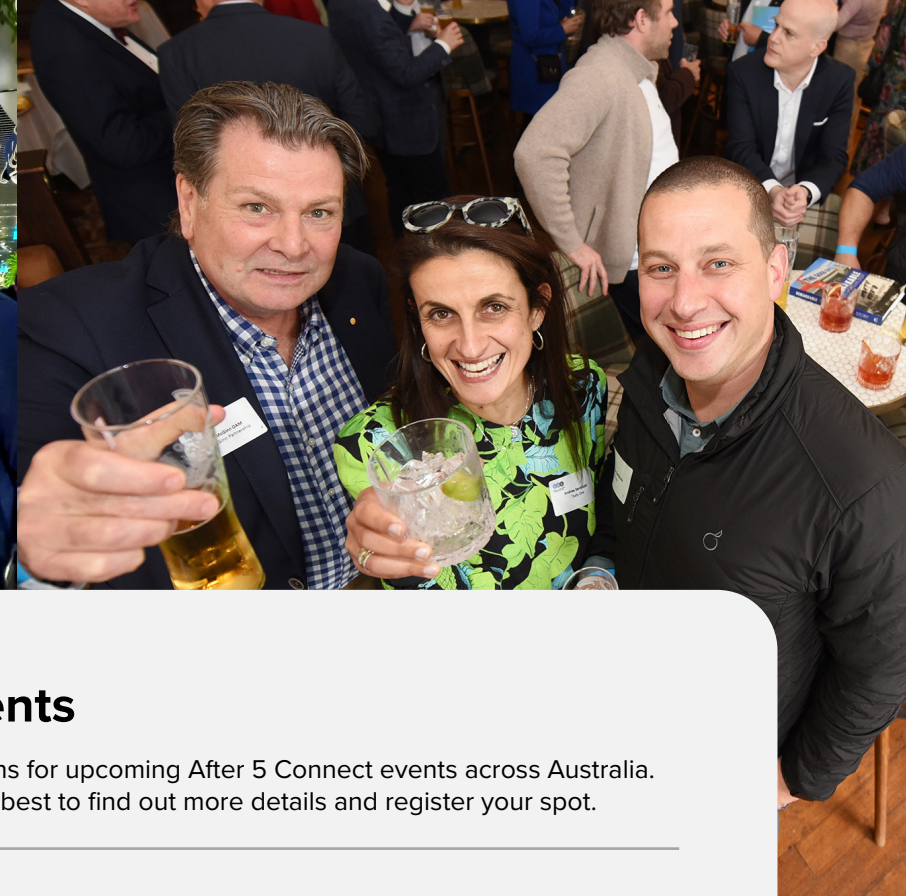
The Rowing Pavilion - Mount Pleasant
Thursday 28 May, 10:00am - 11:00am

The Partisan Perth - East Perth
Wednesday 11 November, 10:00am - 11:30am

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...



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 and 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 years achievements across the family business sector alongside your FBA community.

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

FORUM GROUPS

Our Forum Program has been a cornerstone of FBA for 25 years, providing a confidential space for family business leaders to connect, share experiences, and find trusted support. Led by an independent facilitator, Forum Groups offer an opportunity to navigate challenges, workshop ideas, and learn from your peers. Choose to participate in-person, virtually or in a group dedicated to women in family business. We are also proud to offer a 2-year Emerging Leaders Forum Group Program to equip the next generation with the skills and confidence they need to step into leadership. As a bonus, all Forum Group participants can join Your Forum for Learning sessions, where we explore key family business topics alongside Forum Group participants from across the FBA community.

FORUM GROUP PROGRAM

2-YEAR EMERGING LEADERS FORUM GROUP PROGRAM

YOUR FORUM FOR LEARNING





FORUM GROUP PROGRAM

Finding the right people to support you through the unique proposition of working with family is extremely important to address day-to-day operations and the long term wellbeing of your business. Family Business Association's Forum Group Program offers confidential strategic guidance and a professional community that understands the nuanced and complex dynamic of family business, supporting your growth and achieving family goals.

Led by an independent facilitator, Forum Groups offer a supportive and confidential space to navigate challenges, take control of the narrative, raise tough issues, talk through succession solutions, ownership strategies and gain peer perspective to celebrate successes.

“As a business owner, it can be lonely. You're the person everyone relies on for clarity and direction, but where do you turn when you're unsure? Forum Group gives you that outlet. No topic is off-limits, and more often than not, someone else has already navigated a similar challenge.”

Catherine Kuipers, CEO, Two Men and a Truck

“When we were looking to move our headquarters and change the business' direction, it was the advice and strategies I'd heard in Forum Group that gave me the confidence to convince my family it was the right move. Now we've grown from 10 people to 150.”

Charlie Emery, Managing Director, SOILCO



10 meetings
per year



4-hour (in-person)
3-hour (virtual)
sessions



Experienced
independent
facilitator



Like-minded,
non-competing
family business peers

FIND YOUR FORUM GROUP

IN-PERSON FORUM

A face-to-face Forum Group experience, where like-minded, non-competing peers in family business come together for collective learning, growth and support throughout the year.

EMERGING LEADERS FORUM

Our 2-year program is designed to help young family business members gain essential leadership and management skills while connecting with like-minded peers in a confidential setting. Through a structured and facilitated agenda, participants develop competencies and networks crucial for future success.

CEO AND EXECUTIVE FORUM

An exclusive network for leaders from complex, multi-million dollar family businesses to engage in confidential and candid solutions-focused discussions. In this space, owners, CEOs and senior executives, connect monthly with peers who truly understand the stakes and demands of guiding a family business to success.

VIRTUAL FORUM

An accessible and flexible way to participate in Forum Group, Virtual Forum offers the same confidential, safe and trusted space through the convenience of an online platform.

WOMEN IN FORUM | VIRTUAL

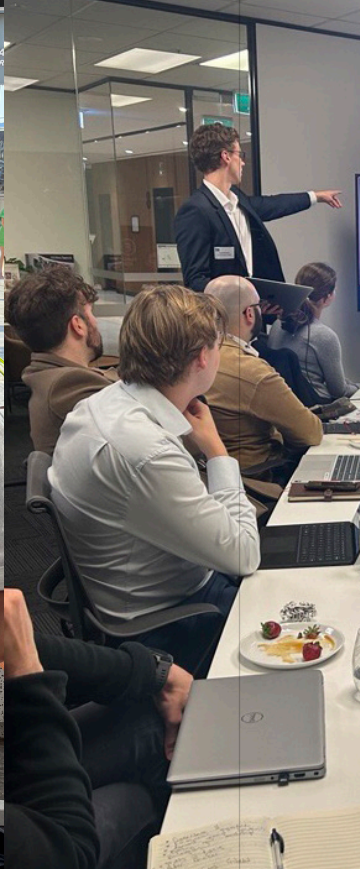
We recognise the vital role women play in family. Exclusively for women, this unique Forum Group is facilitated by an independent female leader in family business, providing guidance and networking opportunities in a virtual format.

“

FBA Forum Groups add tremendous value to any executive juggling the demands of business and family. Meetings offer a dedicated window each month to step back, reflect, and work on your business with like-minded people from a variety of industries. The value of that confidential independent perspective is immeasurable.”

Anthony O'Sullivan, Group CEO & MD, Abbe

Join a Forum Group



EMERGING LEADERS FORUM GROUP PROGRAM

FBA's Forum Group Program fosters a community where like-minded peers come together for collective learning, growth and support. Our 2-year Emerging Leaders Forum Group Program, combines the support of a Forum Group with leadership training and best-practice skill building to prepare the next generation of family business leaders.

Equipping future leaders with critical skills for the next decade is vital for the longevity of your family business. This program is designed to help young family business members gain essential leadership and management skills while connecting with like-minded peers in a confidential setting. Through a structured and facilitated agenda, participants will develop the competencies and networks crucial for future success.

Participants will learn best practice from leading Australian family businesses and drive their own businesses forward with fresh insights and strategies.

The Emerging Leaders Forum Group Program is currently operating in Melbourne and Sydney, with applications and expressions of interest open to Brisbane, Darwin, Perth and Adelaide.

KEY OUTCOMES

Develop a personal leadership framework and behaviour set.

Understand the building blocks for success in family business.

Exposure to best-practice from successful family businesses.

Intergrate soft and hard skills for professional growth.

“

It has set me up for success in a way that I don't know what else would have.”

Caitlin Crowther, Alura Coaches

2 Years of Tailored Content

Ten meetings per year | 2-day retreat

Each meeting will typically include 2 hours of facilitated peer-to-peer discussion, a light lunch and Q&A with successful family businesses or presentations from subject matter experts.

Year 1

Preparing to be a future leader

Effective communication skills for family business

Building your self confidence

Independently financially wealthy

Personal productivity toolkit

How to be a great networker

Finance for non-finance people

Family business Q&A

2-DAY RETREAT

Leadership & self development

Year 2

Understanding and preparing for AI in family business

Developing a customer centric mindset

Pitching to win

The entrepreneurial mindset

Strong interpersonal relationships

Digital marketing strategies

Effective risk management

Family business Q&A

2-DAY RETREAT

Leadership & self development

Learn directly from families in business

You'll spend quality time with leading Australian family businesses to understand their success strategies. They will explore growth challenges and solutions, leadership qualities, recruitment strategies, customer needs, and much more.

For example:



Express Your Interest



YOUR FORUM FOR LEARNING

OPEN TO ALL FORUM GROUP PARTICIPANTS

Come together with Forum Group participants from across the FBA community for an exclusive learning experience. Your Forum for Learning events are designed to explore key topics through a family business lens, providing strategies and discussion tailored to the opportunities, challenges and nuances of working in a family business.

At each session, you will hear from an industry expert or panel of experts on a focused topic, ranging from AI and people management to family business dynamics and mental health. Through professional case studies, lived experiences and interactive Q&A, you'll gain practical takeaways that you can implement directly in your business.

These events are also an opportunity to strengthen connections across the broader Forum Group network, encouraging meaningful discussions in a supportive, collaborative environment with people who truly understand the family business context.

WHY ATTEND?

Connect with Forum Group participants from across the FBA community.

Explore key topics through a family business lens.

Learn from industry experts who provide tested actionable strategies for continued business and personal success.

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

Your Forum for Learning Events

Below, you'll find the dates and locations for upcoming Your Forum for Learning events across Australia. **Click on the date** that suits you best to find out more details and register your spot.

New South Wales

KPMG Sydney, Hybrid Event
Thursday 12 March, 4:00pm - 6:00pm

Topic: AI, Data, and Robotics

★ All Forum Group participants are able to attend this session online.

Queensland

KPMG Brisbane, In-Person Event
Tuesday 17 March, 3:00pm - 5:00pm

Topic: Managing Mental Health in the Workplace

South Australia

Hood Sweeney Dulwich, In-Person Event
Thursday 26 March, 3:30pm - 5:30pm

Topic: People Power

Victoria

Venue details to come, In-Person Event
Thursday 19 March, 4:00pm - 6:00pm

Topic: Psychological Safety

Western Australia

ANZ Perth, In-Person Event
Wednesday 11 March, 12:00pm - 2:00pm

Topic: Family Business Dynamics

FAMILY BUSINESS ESSENTIALS
GOVERNANCE AND DIRECTORSHIP
FAMILY BUSINESS DYNAMICS
PLANNING SUCCESSION
STRATEGIC BUSINESS PLANNING
FINANCIAL ESSENTIALS

EDUCATION

FBA's education program is uniquely designed to address the specific needs, nuances and opportunities of family businesses. Our series of courses provide essential knowledge and skills with a family business lens, ensuring you walk away with tangible and actionable learnings that can be applied in your business. Whether you're looking to strengthen your business foundation, enhance financial based decision-making, improve your family dynamics, create clarity in your business strategy, plan for succession, or improve your governance structure, we have a course to help guide you. Explore our family business specific courses to continuously evolve in your business growth.



FAMILY BUSINESS ESSENTIALS

INCLUDED IN YOUR FBA MEMBERSHIP

Take a focused approach to strengthening your family business. The Family Business Essentials workshop will guide you through an interactive workshop that uses a family business diagnostic tool to identify key areas for improvement. You'll leave with tailored strategies and actionable plans to enhance your business and leverage its unique competitive advantages.

The Family Business Essentials workshop offers an invaluable opportunity for family business owners and key members to assess and strengthen your business' foundation. Through an interactive session, you will explore the core elements that make family businesses unique and gain an insight into how to professionally manage the interconnected systems of family, business, and ownership.

“

Great afternoon with great people and really great topics of conversation.”

JP Mills, The CFO Centre

KEY LEARNINGS

Understand the key elements of a successful family business.

Learn how to apply these elements to your own family business.

Identify areas of your family business that need attention and set priorities for improvement.

Develop a personalised action plan to implement in your business.

Gain insights into the competitive advantages that family businesses have over non-family businesses.

WHO SHOULD ATTEND?

All members involved in strategically guiding the family business.

Anyone seeking to develop a sustainable, successful family business model.



Family Business Essentials

Below, you'll find all the dates and times for upcoming Family Business Essentials Workshops. **Simply click on the session** that suits you best to find out more details and register your spot.

★ All Australian-based Family Business Essentials courses are hybrid, and can be attended from any location.

New South Wales

Hybrid - KPMG Parramatta
Thursday 26 March, 1:30pm - 4:30pm AEDT

Hybrid - KPMG Parramatta
Wednesday 2 September, 1:30pm - 4:30pm AEST

Victoria

Hybrid - KPMG Docklands
Thursday 19 March, 1:30pm - 4:30pm AEDT

Hybrid - KPMG Docklands
Thursday 6 August, 1:30pm - 4:30pm AEST

Hybrid - KPMG Docklands
Thursday 5 November, 1:30pm - 4:30pm AEDT

South Australia

Hybrid - Hood Sweeney Dulwich
Wednesday 22 July, 1:30pm - 4:30pm ACST

Queensland

Hybrid - KPMG Brisbane
Thursday 26 February, 1:30pm - 4:30pm AEST

Western Australia

Hybrid - KPMG Perth
Friday 10 April, 1:30pm - 4:30pm AWST

Hybrid - KPMG Perth
Friday 9 October, 1:30pm - 4:30pm AWST

New Zealand

In-Person - Gallagher Christchurch
Thursday 16 April, 1:30pm - 5:00pm NZST

In-Person - KPMG Auckland
Tuesday 22 September, 10:00am - 2:00pm NZST

GOVERNANCE AND DIRECTORSHIP FOR FAMILY BUSINESS

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

This is the only governance and directorship course specifically designed for family businesses. You will learn how to navigate the unique challenges directors face, balancing the interests of family, business, and shareholders. The course covers how to establish and maintain appropriate governance structures, understand your director duties, and implement strategies to meet your family business' specific needs.

Governance and directorship in a family business is complex. Family business directors must juggle the dynamics between family members, business demands, and shareholder expectations, all while ensuring the business thrives. A well-structured governance system can facilitate open communication, reduce internal conflicts, and promote long-term sustainability for your family business.

This course is designed to equip family business owners, directors, and key stakeholders with the tools and knowledge they need to professionalise the governance of their family business and ensure its future success. You will gain a thorough understanding of business and family governance principles, how to establish an effective board structure, and the legal obligations of directors in your family business.

“Absolutely loved the course - each facilitator was extremely knowledgeable, had done so much preparation and gave succinct and clear guidance on many complex areas with rational oversight and clarity. I learned a great deal.”

Chris Scalzo, Scalzo Foods

KEY LEARNINGS

Understand the role a board can play in growing your family business.

Gain a thorough understanding of business and family governance structures.

Learn the unique challenges family business directors face.

Define the core areas of legal responsibilities for directors.

Explore options for structuring a board of directors to suit your family business.

WHO SHOULD ATTEND?

All members involved in strategically guiding the family business.

Executive and non-executive directors of family businesses.

CEOs and senior managers of family businesses.

Family business shareholders.

Governance and Directorship

Below, you'll find all the date and location options for upcoming Governance and Directorship courses across Australia and Online. **Simply click on the date** that suits you best to find out more details and register your spot.

In-House Course - We bring the course to you

Recommended for medium to large family businesses

Bring your team together onsite to focus on your Governance as we bring the Governance and Directorship Course to you. Tailored to your family business' goals and needs, it's a chance to explore your challenges, map out priorities and start shaping practical next steps, so your team walks away aligned and ready to move forward together.

Express your interest for a private course by reaching out to our Education Program Manager, Sarah Herft, education@familybusiness.org.au or your State Representative.

Courses You Can Join

Recommended for small to medium family businesses

Online Course

Online Orientation
Tuesday 7 July, 11:00am - 1:00pm AEST

Workshop 1
Tuesday 14 July, 11:00am - 3:00pm AEST

Workshop 2 (Legal)
Tuesday 21 July, 11:00am - 3:00pm AEST

Workshop 3 (Finance)
Tuesday 28 July, 11:00am - 3:00pm AEST

Workshop 4
Tuesday 2 August, 11:00am - 3:00pm AEST

Group Coaching
Tuesday 18 August, 11:00am - 1:00pm AEST

Queensland

Day 1 - Hybrid at KPMG Brisbane
Wednesday 18 March, 9:00am - 5:00pm

Day 2 - Hybrid at KPMG Brisbane
Thursday 19 March, 9:00am - 5:00pm

Western Australia

Day 1 - In-Person at KPMG Perth
Thursday 13 August, 9:00am - 5:00pm

Day 2 - In-Person at KPMG Perth
Friday 14 August, 9:00am - 5:00pm

FAMILY BUSINESS DYNAMICS SERIES

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

Managing wealth and family businesses across generations is both complex and deeply personal. Success depends on more than financial plans; it requires preparing the family to work together, communicate openly, and plan for the future.

This online interactive series is designed for family business owners who want to strengthen communication, build trust, and create alignment around values, purpose, and long-term legacy.

Through practical tools and real-world insights, you'll learn how to navigate generational differences, hold effective family meetings, define shared priorities, and prepare the next generation for stewardship of both business and wealth.

Delivered By:



KEY LEARNINGS

How to facilitate open, constructive conversations about the future.

The key components of a successful family meeting.

Practical strategies for bridging gaps and fostering mutual respect.

The difference between legal readiness and family readiness.

Techniques to keep discussions productive, enjoyable, engaging and inclusive.

How to engage all family members across generations to align and communicate purpose and values.

How to align financial decisions with shared priorities and aspirations.

WHO SHOULD ATTEND?

Current leaders and members of the family business.

Emerging generation leaders and members of the family business.

Family Business Dynamics Online Workshops

The Family Business Dynamics Series includes 4 workshops, held online monthly across February - May 2026. Register for 1, 2, 3 or all 4 workshops to get the most out of the series. Below, you'll find all the workshop dates. **Simply click on the date** to find out more details and register your spot.

Workshop 1

Family Wealth Conversations

Tuesday, 24 February 2026
11:00am - 2:00pm AEDT

Workshop 2

Understanding Different Generations

Thursday, 19 March 2026
11:00am - 2:00pm AEDT

Workshop 3

Family Meetings and How to Make Them Work

Tuesday, 14 April 2026
11:00am - 2:00pm AEST

Workshop 4

Family Values, Priorities and Purpose of Wealth

Thursday, 7 May 2026
11:00am - 2:00pm AEST

PLANNING SUCCESSION FOR FAMILY BUSINESS

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

Succession in a family business is a complex and strategic process that has a significant impact on its future. Early planning is critical to ensuring a smooth and successful succession. This course dives into key aspects of succession planning, including exit strategies, leadership rules, and the nurturing of successors. Gain the insights needed to mitigate challenges, resolve potential disputes, and promote harmony during this pivotal phase in your family business.

Succession planning is a process that affects not just the current leadership and their chosen successor, but also the broader family and business dynamics, often giving rise to family tensions and conflicts. This course provides hands-on tools to help you address the complexities of succession planning and develop a transition strategy that ensures the long-term success and stability of your family business.

Through case studies and facilitated discussions, you will gain actionable insights that will set you on the path to a successful transition.

“

I found this workshop to be vital as we look at taking our 7th generation into the future as more family members come on board. The course has given me the skills and confidence to start to develop succession plans to ensure the protection of our family business and the next generation.”

Tom Whittenbury, Grundy's Shoes

KEY LEARNINGS

Understand the fundamental ground rules for succession.

Learn how to identify and nurture potential successors.

Address the key challenges of succession and implement strategies to manage them.

Explore leadership and ownership transition models, including sale and succession.

Develop intergenerational dialogue to ensure a smooth transition.

Create an actionable plan to move from knowledge to implementation.

WHO SHOULD ATTEND?

Current and future leaders and managers of the family business.

Non-family executives and other key stakeholders in the transition process.

Planning Succession

Below, you'll find all the date and location options for upcoming Planning Succession courses across Australia and Online. **Simply click on the date** that suits you best to find out more details and register your spot.

In-House Course - We bring the course to you

Recommended for medium to large family businesses

Bring your team together onsite to focus on your succession plan as we bring the Planning Succession for Family Business Course to you. Tailored to your family business' goals and needs, it's a chance to explore your challenges, map out priorities and start shaping practical next steps, so your team walks away aligned and ready to move forward together.

Express your interest for a private course by reaching out to our Education Program Manager, Sarah Herft, education@familybusiness.org.au or your State Representative.

Courses You Can Join

Recommended for small to medium family businesses

Online Course - April

Workshop 1
Wednesday 8 April, 11:00am - 4:00pm AEST

Workshop 2
Wednesday 15 April, 11:00am - 4:00pm AEST

Group Coaching
Wednesday 22 April, 11:00am - 1:00pm AEST

Online Course - September

Workshop 1
Wednesday 9 September, 11:00am - 3:00pm AEST

Workshop 2
Wednesday 16 September, 11:00am - 3:00pm AEST

Group Coaching
Wednesday 23 September, 11:00am - 1:00pm AEST

Western Australia

Day 1 - In-Person at KPMG Perth
Thursday 7 May, 1:00pm - 5:00pm

Day 2 - In-Person at KPMG Perth
Friday 8 May, 9:00am - 4:00pm

ON DEMAND

STRATEGIC BUSINESS PLANNING

FOR FAMILY BUSINESS



Self-paced
online course

8 hours
of content

8 weeks
to complete

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

Developing a strategic plan that aligns with your family's vision, values, and legacy is crucial for driving growth and navigating change. This course provides the tools, knowledge, and resources your family business needs to create a tailored, actionable strategic plan. Delivered through 8 hours of on-demand, self-paced content, the course is designed to be completed at your own pace, with expert guidance and ongoing support throughout.

This course will provide your family business with the knowledge, tools and resources to define its goals and develop a clear roadmap for achieving them. Gain clarity on your business' current position, identify your competitive advantage, and develop a strategic plan that will instill clarity, direction and a systematic decision-making approach.

Each module is complemented by practical exercises to help you apply the learnings to your business, ensuring that you leave the course with an actionable plan and the knowledge to drive meaningful change in your family business.

Find out more and get started

WHAT'S INCLUDED?

2 x 45-minute Webinars

Introduction, and end-of-program implementation guidance.

14 Modules

High-quality videos, written content, and practical exercises.

Practical Tools

SWOT analysis, vision mapping, Pareto, Force Field and more.

Ongoing Support

Guidance from an expert facilitator throughout the course.

WHO SHOULD COMPLETE THE COURSE?

This course is designed for family business leaders who want to work together to create a unified strategic approach for their business:

- Current and future leaders of the family business.
- Business Executives, including CEOs and senior managers.
- Members of the business involved in strategic decision-making.

We recommend completing this course together as a family or business unit to ensure everyone is aligned and equipped with the same strategic tools.

“

It [the course] helped me realise that early discussions, while challenging, are essential to ensure that both the parents' and the next generation's expectations are aligned.”

Hayden Kuyf, REL Group

KEY LEARNINGS

Strategic Clarity

Understand where your family business is now and define your vision for the future.

Competitive Advantage

Leverage being 'family-owned' to stand out in the market.

Tools for Change

Learn processes to improve your business' ability to adapt and succeed.

Improve Communication

Learn how to communicate change, instilling clarity and a clear direction for your family business.

Actionable Plan

Develop a one-page strategic plan for immediate implementation.

FINANCIAL ESSENTIALS

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

Gain the financial knowledge you need to make informed decisions and secure the future of your family business. Financial Essentials is a course designed to help you understand the financial health of your business, establish performance indicators, and assess its true value. With a focus on family business-specific financial challenges, this course will equip you with the tools to drive growth and strategic decision-making.

Throughout the course, you will learn to establish key financial indicators, build financial dashboards, and assess the value of your business. The course is practical, offering actionable insights that you can apply directly to your family business, helping you to manage its finances and plan for future success.

“

The course was very informative and highlighted where there were weaknesses/gaps in financial reporting in our family business. It was great to learn how to calculate ratios and the examples provided gave us some great ideas for our AGM.”

Justine McAlpine, Three Three's Condiments

KEY LEARNINGS

How to use financial information for strategic decision-making aligned with your business' goals.

Identify key financial indicators to monitor and improve your family business' performance.

Create and use financial dashboards to measure the true financial health of your business.

Learn the different methodologies for valuing your family business.

Understand how to manage competing family priorities from a financial perspective.

WHO SHOULD ATTEND?

Directors and shareholders.

Senior management teams.

Next generation members of the family business.

Financial Essentials

The Financial Essentials course is offered on request.

If you are interested to run a Financial Essentials course within your family business or to attend an upcoming course, please reach out to our Education Program Manager, Sarah Herft, education@familybusiness.org.au, or your State Representative.

THANK YOU TO OUR PARTNERS FOR YOUR ONGOING SUPPORT

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