



FAMILY BUSINESS  
ASSOCIATION

WHAT'S ON AT FBA

# ADVISOR 2025 CALENDAR

Explore Family Business Association Events  
Education Courses and Programs on offer in 2025





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All details provided in the calendar are subject to change

## Australia

### NATIONAL GOLD PARTNERS



### NATIONAL BANKING PARTNER



### NATIONAL TECHNOLOGY PARTNER



## New Zealand

### NATIONAL GOLD PARTNERS



### NATIONAL SILVER PARTNERS



### NATIONAL BANKING PARTNER



## 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 2025 to start planning your year with FBA. From time to time we will include some additional opportunities to add more value to members. 2025 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 and Celebrate are included in your FBA membership and I encourage you to take advantage of them. We are also supporting a masterclass exclusively for our advisors in the first half of 2025. 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 2025: Asia-Pacific held at the Western Sydney Conference Centre in May—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 2025, 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 2025.

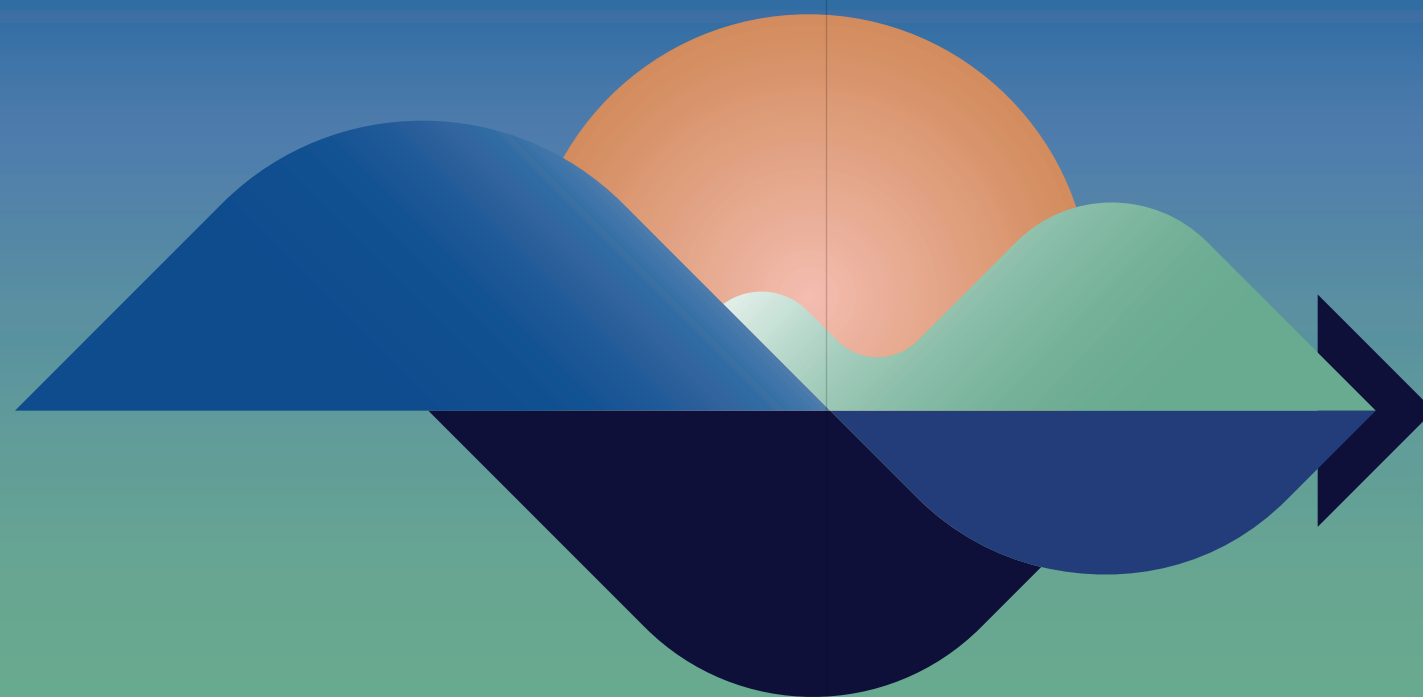
Warm regards,



CATHERINE SAYER  
CEO, Family Business Association

# FAMILY BUSINESS CONFERENCE 2025

ASIA-PACIFIC



BOOK NOW

## Navigating Change

ADAPT. INNOVATE. LEAD. THRIVE.

Western Sydney  
20 – 23 May 2025



LEARN FROM  
EXPERTS



CONNECT  
WITH PEERS



SPARK  
NEW IDEAS



EXPAND YOUR  
NETWORK



EXPERIENCE  
'MAGIC DUST'



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

Now in its 25th year, the Family Business Conference 2025: Asia-Pacific is set to be an unforgettable event, held in Sydney from 20 – 23 May 2025 at the Western Sydney Conference Centre. We have an incredible line-up of local and global experts, each providing valuable insights with a family business lens, and we are bringing back all your favourites — from the Longest Lunch and Family Business Excellence Awards Dinner to Family Business Site Visits!

Our program has been thoughtfully crafted to provide you with real-world tools and takeaways for navigating change in family business, guiding you through vital topics — economic outlooks, the technology landscape, intergenerational dynamics, the value of partnerships, and more. Featuring a range of expert keynote presentations, family business stories, interactive workshops, and parallel sessions, you'll hear from notable speakers such as former Facebook CEO Stephen Scheeler and leading business and finance commentator David Koch.

The Family Business Conference is more than a series of tailored sessions — it's a community of like-minded people who truly understand what it means to be in family business, creating a supportive and trusting environment for each other. The vulnerability, openness to share, and readiness to assist each other is a testament to the strength and camaraderie of the FBA community and the special 'magic dust' they create.



# 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 event program offers something for everyone. Our annual Family Business Insights Conferences deliver thought-provoking perspectives from industry leaders and subject matter experts, 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

WEALTH 3.0  
MASTERCLASS

MEET THE OWNER

AFTER 5 CONNECT

CELEBRATE

FAMILY BUSINESS  
INSIGHTS CONFERENCE







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

Hybrid - Parramatta

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

### Queensland

Hybrid - Brisbane CBD

Wednesday 12 February, 12:00pm - 1:30pm  
Wednesday 12 March, 12:00pm - 1:30pm  
Wednesday 9 April, 12:00pm - 1:30pm  
Wednesday 14 May, 12:00pm - 1:30pm  
Wednesday 11 June, 12:00pm - 1:30pm  
Wednesday 9 July, 12:00pm - 1:30pm  
Wednesday 6 August, 12:00pm - 1:30pm  
Wednesday 10 September, 12:00pm - 1:30pm  
Wednesday 8 October, 12:00pm - 1:30pm  
Wednesday 12 November, 12:00pm - 1:30pm

### South Australia and NT

Hybrid - Adelaide CBD

Tuesday 18 February, 7:30am - 9:00am  
Tuesday 18 March, 7:30am - 9:00am  
Tuesday 8 April, 7:30am - 9:00am  
Tuesday 13 May, 12:30pm - 2:00pm  
Tuesday 10 June, 12:30pm - 2:00pm  
Tuesday 22 July, 7:30am - 9:00am  
Tuesday 12 August, 7:30am - 9:00am  
Tuesday 9 September, 7:30am - 9:00am  
Tuesday 14 October, 7:30am - 9:00am  
Tuesday 18 November, 5:30pm - 7:00pm

### Victoria and Tasmania

Hybrid - Melbourne CBD

Tuesday 18 February, 7:30am - 9:00am  
Tuesday 18 March, 7:30am - 9:00am  
Tuesday 15 April, 7:30am - 9:00am  
Tuesday 27 May, 5:00pm - 6:30pm  
Tuesday 17 June, 7:30am - 9:00am  
Tuesday 15 July, 7:30am - 9:00am  
Tuesday 19 August, 7:30am - 9:00am  
Tuesday 16 September, 7:30am - 9:00am  
Tuesday 21 October, 5:00pm - 6:30pm  
Tuesday 18 November, 7:30am - 9:00am

### Western Australia

Hybrid - Perth CBD

Tuesday 18 February, 7:30am - 9:00am  
Wednesday 19 March, 7:30am - 9:00am  
Tuesday 15 April, 7:30am - 9:00am  
Tuesday 14 May, 5:00pm - 6:30pm  
Tuesday 17 June, 7:30am - 9:00am  
Wednesday 16 July, 7:30am - 9:00am  
Tuesday 19 August, 7:30am - 9:00am  
Wednesday 17 September, 7:30am - 9:00am  
Tuesday 21 October, 7:30am - 9:00am  
Wednesday 19 November, 7:30am - 9:00am

### Auckland

Hybrid - Auckland CBD

Wednesday 22 January, 7:30am - 9:00am  
Wednesday 19 March, 7:30am - 9:00am

Wednesday 14 May, 7:30am - 9:00am

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

Wednesday 17 September, 7:30am - 9:00am

Wednesday 19 November, 7:30am - 9:00am





# WEALTH 3.0 MASTERCLASS

ACCESS DISCOUNTED RATES WITH AN FBA MEMBERSHIP

We are supporting a masterclass exclusively for advisors. Step into the world of Wealth 3.0 with this engaging interactive session. Through the lens of the Flintstones family, you'll explore how traditional approaches to advising impacts multi-generational wealth transitions. Gain valuable insights into holistic practices that foster collaboration, improve client outcomes, and support positive family dynamics.

This masterclass will bring Wealth 3.0 concepts to life.

Through activities, case studies, and collaborative discussions, you'll delve into topics such as the shift from Wealth 1.0 to 3.0, the 10 domains of wealth, and strategies for aligning advisory practices with what families truly want. Cindy's expertise in integrating technical knowledge with family dynamics offers practical tools to empower your clients and support their long-term success.

## WHY ATTEND?

Understand the evolution from Wealth 1.0 to Wealth 3.0 and its impact on advisory practices.

Learn how to foster collaboration and address multi-generational family dynamics.

Gain practical tools to help clients align their wealth with their goals.

Network and connect with like-minded advisors supporting family businesses.

## Masterclass

We will be hosting three masterclasses around Australia. All dates and locations are listed here.

Simply click on the date and location that suits you best to find out more details and register your spot.

### South Australia and NT

Tuesday  
25 February  
1:30pm - 6:00pm

University of Adelaide Business School

### Victoria and Tasmania

Friday  
28 February  
1:30pm - 6:00pm

Deakin University - Melbourne

### New South Wales and ACT

Thursday  
6 March  
1:30pm - 6:00pm

Bentleys Accountants - Sydney

## SPEAKER



**CINDY RADU**  
LL.B, LL.M. TEP, ICD.D

With over 30 years of experience across law, accounting, trusts and governance, Cindy supports exceptional families with amplifying their wealth potential across generations.

Her collaborative approach connects deep technical knowledge with a compassionate focus on family dynamics, fostering open communication and informed decision-making.





# MEET THE OWNER

INCLUDED IN YOUR FBA MEMBERSHIP

Step inside the world of a local family business with Meet the Owner. These exclusive events offer a rare behind-the-scenes tour and the chance to hear directly from the family behind the business. Learn their story, gain valuable insights, and connect with like-minded family business peers in an inspiring, relaxed setting.

Meet the Owner invites you to experience the inner workings of a family business. From touring diverse premises—be it a factory, winery, or warehouse—to engaging in an open Q&A session, this event offers a unique glimpse into the experiences of a family business. Discover the rich history, challenges, and triumphs of the host family as they share insights tailored to help other family businesses succeed.

After the tour, enjoy networking with peers in the family business sector. These events foster a supportive, collaborative community, filled with learning, storytelling, and the camaraderie that defines FBA events.

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

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.

### New South Wales and ACT

- Total Image Group - Marrickville  
Wednesday 19 March, 5:00pm - 8:00pm
- Taylor's Wines - Alexandria  
Thursday 24 July, 5:00pm - 8:00pm
- Brand for Brands - Sydney CBD  
Thursday 11 September, 5:00pm - 8:00pm

### Queensland

- Driveline Services Australia - Acacia Ridge  
Thursday 3 April, 5:00pm - 7:00pm
- NewDirection Care - Bellmere  
Friday 25 July, 10:30am - 12:30pm
- Sharpe Engineering - Virginia  
Wednesday 3 September, 5:00pm - 7:00pm

### South Australia and NT

- Wallis Cinemas - North Adelaide  
Wednesday 19 March, 5:00pm - 9:00pm
- The Yoghurt Shop - Burton  
Wednesday 6 August, 6:00pm - 8:00pm
- Cochrane's Transport - Gilman  
Wednesday 17 September, 6:00pm - 8:00pm

### Victoria and Tasmania

- Daisy's Garden Supplies - Ringwood  
Wednesday 19 March, 5:30pm - 7:30pm
- All Saints Estate - South Yarra  
Thursday 24 July, 5:00pm - 7:00pm
- Sutton Tools - Thomastown  
Friday 19 September, 8:30am - 10:30am

### Western Australia

- The CFO Centre - Fremantle  
Thursday 20 March, 6:00pm - 8:00pm
- Blueforce Allcare - Innaloo  
Wednesday 23 July, 6:00pm - 8:00pm
- Quickmail - Kenwick  
Thursday 23 October, 6:00pm - 8:00pm

### Auckland

- Youngman Richardson & Co - Rosedale  
Thursday 27 February, 5:30pm - 7:30pm
- Service Foods - Māngere  
Thursday 8 May, 5:30pm - 7:30pm
- Giltrap Group - Grey Lynn  
Wednesday 13 August, 5:30pm - 7:30pm

### Christchurch

- Russell Group - Christchurch  
Wednesday 19 March, 5:00pm - 7:30pm
- Youngman Richardson & Co - Sockburn  
Tuesday 17 June, 5:30pm - 7:30pm
- Sutton Tools - Rangiora  
Thursday 11 September, 5:30pm - 7:30pm





# AFTER 5 CONNECT

## INCLUDED IN YOUR FBA MEMBERSHIP

Unwind and connect at After 5, an evening networking event for FBA members. Join the FBA community to enjoy drinks and nibbles while building relationships with like-minded peers. Share experiences, exchange ideas, and discover new opportunities in a relaxed and welcoming atmosphere.

After 5 is the perfect way to transition from work to an evening out with other FBA members. Held at a local venue, this event offers a friendly environment to discuss challenges and successes, and expand your network.

These informal evenings encourage open conversations, whether you're catching up with familiar faces or forming new connections. It's a chance to exchange ideas, gain fresh perspectives, and explore collaboration opportunities—all within the supportive and trusting FBA community.

## 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 collaborators.

Enjoy a welcoming environment for open and meaningful conversations.

## 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

Bungalow Bar - Sydney CBD  
Thursday 13 February, 5:00pm - 8:00pm

Albion Hotel - Parramatta  
Thursday 8 May, 5:00pm - 8:00pm

The Sussex Hotel (Rooftop) - Sydney CBD  
Thursday 19 June, 5:00pm - 9:00pm

Ryan's Bar - Sydney CBD  
Thursday 2 October, 5:00pm - 9:00pm

### Queensland

Sixteen Antlers Rooftop Bar - Brisbane CBD  
Thursday 27 February, 5:00pm - 7:00pm

Tippler's Tap - South Brisbane  
Wednesday 7 May, 5:00pm - 7:00pm

Broadbeach Tavern - Gold Coast Broadbeach  
Friday 1 August, 5:00pm - 7:00pm

### South Australia and NT

Arkaba Hotel - Fullarton  
Wednesday 26 February, 5:00pm - 7:00pm

The Gallery - Adelaide  
Wednesday 7 May, 5:00pm - 7:00pm

Illuminate Adelaide Base Camp - Adelaide  
Wednesday 23 July, 5:00pm - 7:00pm

### Victoria and Tasmania

FBA Head Office - Melbourne  
Tuesday 25 February, 4:30pm - 6:30pm

Emerald Hotel - South Melbourne  
Thursday 8 May, 5:00pm - 7:00pm

### Western Australia

Running With Thieves - South Fremantle  
Wednesday 30 April, 5:00pm - 7:00pm

The Stables - Perth CBD  
Thursday 26 June, 5:30pm - 8:00pm





# 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, enjoy a meal, and hear key insights into the economy and property market in a supportive and collaborative setting.

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, 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 outlook and property market trends.

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

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

Enjoy a meal while expanding your network and exploring opportunities for future collaboration.

## Economic Outlook Breakfast Events

Below, you'll find the dates and locations 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.

### New South Wales and ACT

ANZ Tower - Sydney CBD  
Thursday 28 August, 8:00am - 9:30am

### South Australia and NT

Lockleys Hotel - Fulham  
Thursday 21 August, 7:30am - 9:00am

### Victoria and Tasmania

ANZ Centre - Docklands  
Thursday 31 July, 7:30am - 9:00am

### Auckland

## Post Budget Breakfast with Hon Nicola Willis, Finance Minister

ANZ Centre, Auckland  
Thursday 5 June, 7:30am - 9:00am

Join us in Auckland for a post-budget briefing with Finance Minister, Hon Nicola Willis. In one of her first public appearances after the 2025 Budget (released on 22 May), she will 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

INCLUDED IN YOUR FBA MEMBERSHIP

Join us for Celebrate and close out the year on a high note with your family business peers! It's a great opportunity to come together as a family business community to reflect on and celebrate the achievements of the year. With great company, drinks, and canapés, this is your chance to celebrate success, share stories, and have a fun night together.

Celebrate is FBA's end-of-year event, bringing the family business community together to reflect on and acknowledge the achievements of the past year. It's an opportunity to share experiences, and celebrate the impact of the family business sector.

Celebrate is FBA's way of thanking the community for your hard work and dedication, offering a moment to look back, and gear up for a great new year ahead.

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 Events

Find the Celebrate event in your area. All dates and locations are listed below for our end-of-year events.

Simply click on the date and location that suits you best to find out more details and register your spot.

New South Wales and ACT

Thursday  
27 November,  
5:30pm - 9:00pm  
Swaab - Sydney CBD

Queensland

Wednesday  
26 November  
5:00pm - 7:00pm  
Lord Stanley Hotel

South Australia and NT

Wednesday  
26 November  
5:00pm - 7:00pm  
Secret Garden, Marion Hotel

Victoria and Tasmania

Thursday  
27 November  
5:30pm - 8:30pm  
The Precinct Hotel

Western Australia

Thursday  
27 November  
6:00pm - 8:30pm  
Boston Brewing Co Vic Park

Auckland

Tuesday  
18 November  
The Northern Club  
Hosted by Jackson Russell

Christchurch

Thursday  
20 November  
Commodore Hotel





# 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 2025/26. After an afternoon of thought-provoking sessions, the event finishes with networking drinks, offering a great opportunities 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 2025/26.

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

Thursday  
30 October  
11:30am - 6:00pm

[Register Today](#)

### Queensland

Thursday  
11 September  
11:30am - 6:00pm

[Register Today](#)

### South Australia and NT

Thursday  
23 October  
11:30am - 6:00pm

[Register Today](#)

### Victoria and Tasmania

Thursday  
9 October  
11:30am - 6:00pm

[Register Today](#)

### Western Australia

Tuesday  
23 September  
11:30am - 6:00pm

[Register Today](#)

### New Zealand

Thursday  
16 October  
11:30am - 6:30pm

[Register Today](#)



# EDUCATION

FBA's Accredited Advisor Program is 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
- PART 2

## ACCREDITED ADVISOR MASTERCLASS SERIES - GENERATIONAL WEALTH TRANSFER





## ADVISOR ACCREDITATION PROGRAM

# ADVISING BUSINESS FAMILIES PART 1 & 2

## 2025 Program Start Dates

**March**  
18 Mar - 29 Apr

**October**  
7 Oct - 18 Nov

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 and register today](#)

### 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**

### WHO SHOULD COMPLETE THE COURSE?

This course 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.



## 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
- Speakers Bureau for Client Events
- 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 Dates

### Orientation

2 September 2025  
11am - 1pm AEST

### Workshop 1

9 September 2025  
11am - 1pm AEST

### Workshop 2

30 September 2025  
11am - 1pm AEST

### Workshop 3

21 October 2025  
11am - 1pm AEDT



## THANK YOU TO OUR PARTNERS FOR YOUR ONGOING SUPPORT

### Australia

#### NATIONAL GOLD PARTNERS



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