



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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## 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

AFTER 5 CONNECT

WEALTH 3.0  
MASTERCLASS

CELEBRATE

MEET THE OWNER

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.

## 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.

## 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

Wednesday  
5 March  
1:30pm - 6:00pm

Bentleys Accountants - Sydney



# 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. If you see this symbol, **SD**, please save the date, bookings are not open yet.

### New South Wales and ACT

Total Image Group - Marrickville  
Wednesday 19 March, 5:00pm - 8:00pm

**SD** Taylor's Wines - Alexandria  
Thursday 24 July, 5:00pm - 8:00pm

More to come...

### Queensland

Driveline Services Australia - Acacia Ridge  
Wednesday 12 March, 5:00pm - 7:00pm

**SD** NewDirection Care - Bellmere  
Friday 25 July, time to be confirmed

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

**SD** Haigh's Chocolates - Salisbury South  
Wednesday 7 May, time to be confirmed

**SD** Cochrane's - Gilman  
Wednesday 17 September, time to be confirmed

### Victoria and Tasmania

Daisy's Garden Supplies - Ringwood  
Wednesday 19 March, 5:30pm - 7:30pm

**SD** All Saints Estate - Hawksburn  
Thursday 24 July, 5:00pm - 7:00pm

**SD** Sutton Tools - Thomastown  
Friday 19 September, time to be confirmed

### Western Australia

The CFO Centre - Fremantle  
Thursday 20 March, 6:00pm - 8:00pm

**SD** Camera Electronic - Perth CBD  
Wednesday 11 June, 6:00pm - 8:00pm

More to come...

### Auckland

Youngman Richardson & Co - Rosedale  
Thursday 27 February, 5:30pm - 7:30pm

Service Foods - Māngere  
Thursday 8 May, 5:30pm - 7:30pm

August event to come...

### Christchurch

Russell Group - Christchurch  
Wednesday 19 March, 5:00pm - 7:30pm

**SD** Family Business to be confirmed  
Tuesday 17 June

August event to come...



# 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 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

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

More to come...

### 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

More to come...

### South Australia and NT

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

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

More to come...

### Victoria and Tasmania

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

**SD** Venue to be confirmed  
Thursday 8 May, 5:30pm - 7:00pm

More to come...

### Western Australia

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

More to come...





# 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  
Stratton Bar and Kitchen

### South Australia and NT

Friday  
28 November  
5:00pm - 9:00pm  
[Save the Date](#)

### Victoria and Tasmania

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

### Western Australia

Thursday  
27 November  
6:00pm - 8:30pm  
[Save the Date](#)

### Auckland

Wednesday  
19 November  
Hosted by Jackson Russell  
[Save the Date](#)

### Christchurch

Thursday  
20 November  
[Save the Date](#)



# 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

Save the Date

### Queensland

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

Save the Date

### South Australia and NT

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

Save the Date

### Victoria and Tasmania

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

Save the Date

### Western Australia

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

Save the Date

### New Zealand

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

Save the Date

# 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



## ADVISOR ACCREDITATION PROGRAM

# ADVISING BUSINESS FAMILIES PART 1 & 2

2025 Program  
Start Dates

March  
18 March - 29 April

October  
To be confirmed

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.

# THANK YOU TO OUR PARTNERS FOR YOUR ONGOING SUPPORT

## Australia

### NATIONAL GOLD PARTNERS



### NATIONAL BANKING PARTNER



### NATIONAL TECHNOLOGY PARTNER



## New Zealand

### NATIONAL GOLD PARTNERS



### NATIONAL SILVER PARTNERS



### NATIONAL BANKING PARTNER



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