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PEOPLE

The World's Top Family Enterprise Advisors



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The FamCap 50 Advisors are the top advisors (non-academic) in the family enterprise world. They are outstanding advisors to family enterprises in finance, law, executive search, consultancy, training, and more.

Family Capital compiled the list by polling its readers earlier this year, reviewing their activities during the year, and assessing their overall gravitas in the ecosystem of family enterprises.

The idea was to focus exclusively on the commercial advisor world of family enterprises and not include those connected to an academic institution—a separate ranking of those advisors will be published later this year.

These individuals and the institutions they work for are making a big difference to family enterprises and helping to make the ecosystem a better place for all those involved in the sector.

Family Capital has ranked the Top Ten, who have made a particularly exceptional contribution to the world of family enterprises.

We have listed the rest of the 50 in alphabetical order.

1. Judy Green, president, Family Firm Institute, Boston



Most in the consultancy world of family businesses would agree that Green is the one who has done the most to grow the advisory world to family enterprises. She's effectively the advisor to the advisors. Green has been president of the FFI since 1992, and during that time, more than 30 years of dedication have done more than anyone to build the institute's reputation.

She remains deeply committed to the sector and has offered an expert guiding hand to many advisors during her long and illustrious career at FFI. She received many nominations, and almost all mentioned her professionalism, dedication, and commitment to family enterprises.

2. Peter Englisch, advisor,

Peter Englisch Consulting, Essen



For years, Englisch has gained a huge reputation as a family enterprise consultant, first with EY and then with PwC. Now working as an independent consultant after retirement rules saw him leave PwC earlier this year, Englisch remains firmly committed to the sector, taking up various non-executive directorships on family businesses and as an executive in residence with a specialism towards family enterprises at the Swiss business school IMD. Englisch received many nominations, and many commended him as truly dedicated to the sector like few others. One said: I am very impressed by the way he built perhaps the most progressive team serving family investment companies and family offices anywhere.

3. Trish Botoff, founder, managing principal,



Botoff Consulting, Los Angeles

Botoff has created the top family enterprise compensation data and consulting services group, Botoff Consulting, which has gained worldwide recognition as a pathfinder in the sector. She and her company's expertise in the sector is diligently followed by many family enterprises. Botoff received many nominations, with a common theme in many of those accolades mentioning her profound professionalism and expertise.



4. William Kambas, partner, Withers, New York City

Few people know the regulatory and legal side of the world of family enterprises and Kambas, which is why he received many nominations. Kambas's reputation comes from the whole gambit of family enterprise matters, particularly tax planning, cross border investments, and those who nominated him say Kambas is a true professional, working diligently to solve challenging legal and regulatory issues family enterprises often face.



5. Walid Chiniara, founder, Chiniara & Co., Dubai

Chiniara is arguably the top advisor to family enterprises in the Gulf region, gaining a big reputation at Deloitte's and continuing to do so as an independent consultant. A trained barrister – Chiniara also knows many of the legal issues pertaining to the sector better than most. He's built up a great reputation not just because of his hard work and dedication but also his considerable charm, say many who nominated him.

6. Alexis du Roy, CEO, The Family Business Network, Lausanne



Du Roy took over the hugely influential Family Business Network more than ten years ago and has grown its membership and geographical footprint through his hard work and passionate approach to the sector. Coming from a family business background, du Roy has become an acknowledged ambassador for the family enterprise world. Those who nominated him – and there were many – say he is arguably the most diplomatic individual in the sector, which he combines well with his gravitas and in-depth knowledge of the issues facing family enterprises.



7. Pascal Levensohn, founder, Levensohn Venture Partners, Geneva

Levensohn was a pathfinder in the now well-established link between venture capital and family offices, advising many family enterprises about the opportunities and risks associated with investing in startups. He continues to do this from his base in Geneva, where he also helps Dolby Family Ventures source deals. Those who nominated Levensohn say his depth of experience in his speciality—venture and family offices—is second to none.



8. Elisabeth Lind, managing director, Cambridge Associates, London

Lind is the go-to individual regarding the hugely significant link between family offices and Cambridge Associates. Lind has got some big calls right on the investment side, like a warning about stretched valuations and never-ending funding assumptions in the private markets. That has earned her respect among the investment fraternity running family offices and many nominations from *Family Capital* readers, who say she has greatly strengthened the already robust relationship between her firm and family offices.



9. Sara Hamilton, founder, Family Office Exchange, Chicago

Few have had such a visionary influence over the family office world as Hamilton has, particularly over such a long period. Founding the Family Office Exchange in 1989 when family offices were little in the public domain, Hamilton and FOX are, as those who nominated stress, the gold standard for membership and advisory work with family offices.



10. Andreas Von Specht, founder, AvS Advisors, Frankfurt/Paris

Von Specht, who comes from a family business background, has achieved a reputation as one of the top independent executive search specialists for the family enterprise world in Europe. He is extremely well-connected, especially with top leaders of German family enterprises, which has enabled von Specht to understand the sector from a recruitment perspective, say those who nominated him.

The Rest – in alphabetical order



Nikè Anani, founder, African Family Firms and Next Gen Advisor, Northern Trust Corporation

Anani has established her reputation as a top family business advisor and has done much to grow the knowledge and expertise of African family enterprises. Those who nominated her say she is a pathfinder for the family business sector in Africa and has been paramount in raising awareness of the sector in the region and beyond.

Paul Andrews, founder, Family Business United, London



Andrews is one of the most passionate exponents of the attributes of the family business sector anywhere, and he's brought that passion to his advisory group, Family Business United, for more than ten years. Those who nominated him say Andrews has helped enormously to raise the profile of especially small and mid-sized family businesses in the UK.



Doug Baumuel, founder, Continuity Family Business Consulting, Boston

From a family business background, Baumuel knows the sector intimately and has gained a formidable reputation as one of the business consultants in the sector. Those who nominated Baumuel say he's a great asset to the family enterprise world.



Jonathan Flack, global and US leader for family office and family business, PwC, Nashville

Flack recently took over from Peter Englisch as global leader for family enterprises at PwC and has built up relationships with many of the biggest US family businesses and offices over more than ten years as US family business leader for the professional services group. Those who nominated him say Flack is a valued, trusted advisor in the family enterprise world, which was a big part of why he gained the top role at PwC.



Thomas Frauenlob, head intermediaries & family offices, Julis Baer, Zurich

Frauenlob was recently given the job of managing Julius Baer's family office clients, and he brings plenty of experience to the position. He spent five years heading up UBS's family office business before joining Julius Baer earlier this year.



Thomas Handler, founder and partner, Handler Law, Chicago

A specialist in estate, tax, and strategic planning for family offices and ultra-high-net-worth individuals, Handler is one of the best lawyers for the family enterprise world. Those who nominated him say Handler is especially good regarding wealth planning advice for family offices.



Ryan Harris, partner, Kirkland & Ellis, Chicago

Harris heads Kirkland's private investment and family office practice and has successfully built relationships with family offices across the US. He has advised many on matters related to finance and complex remuneration structures. Those who nominated Harris say he's one of the world's top lawyers for family offices.



Rhian-Anwen Hamill, business coach, London

With her experience at the top of the executive search world, Hamill now ploughs her trade as a business coach and has developed her reputation, particularly in the family enterprise sector. One nominator said about Hamill: She proved exceptional in listening to the issues, prompting dialogue, and finding optimal solutions.



Ken Hirsch, partner, Goldman Sachs, Menlo Park

Hirsch is arguably Goldman Sachs's top banker regarding family offices. Based in Menlo Park, Hirsch has been the go-to banker for family offices and the tech sector, which has become so important in recent years for investments by private investment offices as the tech world has grown rapidly.



Keith Johnston, co-founder, SFO Alliance, London

Johnston and his partner Lex Van Damm have built SFO Alliance from scratch into arguably the best-attended single-family office membership and event business anywhere. With a deep understanding of what makes family offices tick, those who nominated Johnston say he has also brought a broader understanding of the issues facing the sector.



Mordechai Kubany, founder, CEO, Double Kappa, New York City

Kubany has built a strong following with a cohort of top family offices through his consulting services, particularly his financial and investment structuring focus. Those nominating Kubany say clients seek him out for his ability to establish clear goals, executable action plans, and achievable milestones.



Rob Lachenauer, co-founder, partner, Banyan Global Family Business Advisors, Boston

Lachenauer may have stepped down from managing director role at Banyan a few months ago, but he still remains a pivotal individual in the advisory world of family enterprises. Those who nominated him said he is deeply trusted by industry peers and family owners alike and works with leading families across the globe.



Irwin Latner, managing partner, Latner Law Offices, New York City

Recently setting up his practice in New York City, Latner has gained a reputation as one of the US's top lawyers regarding private markets and family offices. Those who nominated Latner say he has mastered the often complex investment structures of private markets for his mostly family office clients. He's the go-to lawyer for these types of structures for family offices, said one nominator.



Peter Leach, founder, Peter Leach Associates, London

As a highly respected consultant in the family enterprise world for over 30 years, Leach continues to grow his reputation. In the last few years, he has been a special advisor to arguably the most family-enterprise-focused investment group in the world, BDT & MSD Partners. According to those who nominated him, Leach has a worldwide reputation as a top family business consultant and is extremely well-connected.



Jozef Lievens, partner, Roots Advocaten, Bruges

Co-founder and director of the Institute for Family Businesses and co-founder of FBNet Belgium, few professionals know the family enterprise sector in the Benelux world as Lievens does. He also lectures on family enterprises at various business schools. He has become one of Europe's top advocates for the importance of family businesses, as those nominated him have given testament to.



Linda Mack, founder and president, Mack International, West Palm Beach, Florida

Mack is at the top of her game in the family office executive search specialist world. According to those who nominated her, she is among the best-connected executive search specialists for family offices in the US.



Jamie McLaughlin, founder, J. H. McLaughlin & Co, Woodbury, Connecticut

McLaughlin has been associated with the sector for more than 30 years as an acknowledged expert on family office advisor work. Those nominated him say he understands the family office world like few others.



Edward Marshall, global head family office and high net worth, Dentons, New York City

Marshall has been connected to the family office sector for many years, working for financial institutions before joining law firm Dentons in 2020. That's given him great insights into the family office world, much of which he has funnelled into a highly respected annual report on the risks in the sector. One nominee said: Marshall is a master in family office management, bringing together his vast networks of contacts for the client's benefit. A real pro's pro.



Steve Martiros, founder, Martiros Strategies and Kindros, Boston

Martiros is among the few experts who are the go-to for all things strategic in family offices. With years of experience, there are few things Martiros doesn't know about family offices. Those who nominated him say he is a top white-glove service provider in the sector.



Peter May, Peter May Family Business Consulting, Bonn

May continues to have a reputation as one of Germany's best family business consultants and works with many of the country's top family businesses. He was also one of the co-founders of the influential Institute for Family Business at WHU, Otto Beisheim School of Management in Germany, one of Europe's best centres for family enterprise studies.



Michael Meier, co-head of global family business advisory, Egon Zehnder, Düsseldorf

Armed with a PhD and MBA, Meier is one of the best-educated headhunters in the world of family enterprises, and he's put this to good effect, gaining a stellar reputation as a top executive search specialist in the sector.



Sara Mohammadi, senior vice president, DIFC Family Wealth Centre, Dubai

Mohammadi is a former chief executive of the Family Business Council Gulf and has been an important voice in developing a profile for family enterprises in the Gulf region. Now ploughing her craft at the Dubai International Financial Centre, Mohammadi received many nominations, saying she has shown thorough commitment to the sector like few others.



Lauri Oinaala, family enterprise leader (EMEIA), EY, Helsinki

Having gained experience working for a family office, Oinaala is now one of the most influential family enterprise advisors among the Big Four professional services groups. Those who nominated him say he has great expertise, especially in issues concerning the next generation and succession planning.



Marie-Christine Ostermann, president, Die Familienunternehmer (The Family Businesses Association), Berlin

Heralding from a family business and still very much involved, Ostermann knows the sector intimately. She has brought those skills to Germany's top family business lobby group with real commitment, say those who nominated her. At a time when Europe's most high-profile family business sector – Germany – faces pressures like much higher energy costs and next-generation involvement, Ostermann has shown adroitness at dealing with all the stakeholders involved.



Oscar Paez, consultant, The Family Business Consulting Group, Miami

Paez is a globally recognised family business consultant with years of experience at the top of the sector. One nominator said Paez's advisory work, educational initiatives, and personal commitments make him a distinguished and deserving candidate for recognition.



Steve Rigby, board member, Family Business UK, Co-CEO of Rigby Group, London

Rigby, a second-generation member of a prominent family business in the UK, is also a big proponent of the sector's importance for the health of economies. Those who nominated Rigby say he always finds time to advocate for the sector, despite his day-to-day business commitments.



Elisa Sheulin Rizzo, head family office advisory, JP Morgan, New York City

Rizzo is one of JP Morgan's top bankers for family offices. With extensive experience advising them over many years, those who nominated Rizzo say she is one of the best in the business and really understands their financial needs.



Angelo Robles, founder, SFO Continuity, Jackson Hole, Wyoming

Robles has been involved in the family office advisory sector for more than 20 years, first with the Family Office Association and now with SFO Continuity, where he produces a steady stream of informative webinars. Those who nominated Robles say he brings a unique perspective on the family office world.



Kirby Rosplock, founder, CEO, Tamarind Partners, Milwaukee

Rosplock is well-known and respected in the family enterprise sector regarding quality advice. She is also the author of the much-respected *The Complete Family Office Handbook*. Those who nominated her say Rosplock brings expertise and tremendous empathy to her clients' issues.

Blake Shorthouse, partner, KKR, London

Shorthouse heads KKR's influential family office team in Europe and the Middle East and has worked with some of the world's wealthiest families not just at KKR but for many years as a private banker. Nominators say Shorthouse intimately knows the world of family offices and brings a real breath of knowledge to KKR's efforts.



Edward Simmons, head European private capital group, Blackstone, London

Managing Blackstone's relationships with family offices, Simmons has developed a reputation as a top financier in the sector. Those who nominated him say he has helped to grow Blackstone's already deep relationships with family offices to an even stronger level.



Andreas Soffing, partner, Flick Gocke Schaumburg, Frankfurt

Soffing is one of the top family enterprise-specialist lawyers in Germany. A partner in Flick Gocke Schaumburg, which works with many of the country's biggest family businesses and family investment groups, he advises many family offices and foundations on tax and investment structuring, regulatory issues, and governance. Due to his skills working with family offices and businesses in Germany, he has earned accolades from many.



Mark Somers, founder, Somers Partnership, London

Somers has developed a reputation as a top headhunter in family offices. He also works with Trish Boffo on her acclaimed salary surveys on family offices. As one nominee said: Highly knowledgeable on all matters family office, Somers has published two books on the subject. He is seen the go-to person for family office recruitment.



Robert (Bobby) Stover, Americas family enterprise and family office leader, EY, Dallas

Stover has established a stellar reputation in the family enterprise world, having been engaged with the sector for more than 25 years. As one nominator said: Stover has expertise in advising family businesses, their owners, and family members on growing and preserving their wealth while dealing with the complex issues of business succession, governance, income tax, and transfer tax.



Valérie Tandeau de Marsac, founder, VTM Conseil, Paris

An acknowledged expert in family businesses and strategic issues affecting the sector, Few Valérie Tandeau de Marsac is one of Europe's top lawyers in the family enterprise world. Those who nominated her say she's well-connected to France's big family business sector, has authored several books on family businesses, and teaches on the subject at two top French business schools.



Sally Tennant, founder, Acorn Capital Advisers, London

With many years working with some of the wealthiest families and individuals in the world as a top private banker, Tennant has accumulated tremendous and authoritative knowledge on the sector like few others, say those who nominated her.



Daniel Trimarchi, director, family business & private clients, enterprise, KPMG, Melbourne

Trimarchi has built a strong reputation as a family business consultant in Australia and beyond. Nominations of Melbourne-based consultant say he has a deep understanding of family businesses, particularly on issues relating to succession planning and governance.



DJ Van Keuren, founder, Family Office Real Estate Institute, Denver

Van Keuren specialises in real estate consultancy to family offices and has nurtured an excellent reputation in the sector for his expertise. One person who nominated him said: His extensive contributions to the educational landscape of family offices, through publications, articles, the family office real estate institute, and speaking engagements, demonstrate his commitment to advancing industry knowledge and best practices in the sector.



Rich Wolkowitz, founder, Xylogenesi – Family Office Advisory, St. Louis, Missouri

Wolkowitz has built up a depth of knowledge on family enterprises, gained from firsthand experience working for his own family business and two single-family offices. A trained lawyer, Wolkowitz's skills ensure he is at the top of his game when working with principals and senior staff at family offices, say those who nominated him.



James Woolery, founder Woolery & Co, New York City

Woolery founded the eponymous specialist law firm four years ago after heading the M&A practice at King & Spalding. He has many family offices as clients. Those who nominated him say Woolery knows the M&A world and how it pertains to family offices better than most, and he really appreciates the business side as much as the legal part of those relationships.

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