

Wharton Executive Education Offers New Programming for Latin American Family Businesses and Financial Advisors

LATAM programs provide investment knowledge and financial industry insights to wealthy business owners and their advisors

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Miami, FL: Closely-held businesses in Latin America face unique challenges. At issue are not only standard issues such as corporate governance and evaluation of growth opportunities, but also family governance and preservation of wealth. Generational tensions and questions of succession can add to the complexity.

The Aresty Institute of Executive Education at the Wharton School of the University of Pennsylvania has partnered with Family Business and Office School[®], a pioneer in providing education, workshops, and forums to high-net-worth families, individuals, and wealth advisors in Latin America and Miami, to help family members and their advisors and board members face these crucial challenges.

A suite of four LATAM programs leverages the strengths of Wharton's expert faculty and offers the latest research, insights, and best practices in governance, growth, and wealth management:

- *Corporate Governance LATAM* shows current and aspiring board members and those who advise them how to apply ethical and operational perspectives for sound decision-making. Participants gain the skills needed to govern effectively, including an understanding of basic financial applications and how to grow a business, create value, and operate more productively in today's global business environment.
- *Family Governance LATAM* helps founders, family members, next generation of heirs, and family advisors learn how appropriate governance and communication strategies can be used to mitigate many critical issues. They will understand how to develop governance systems that enable better family decision-making, communication, and succession planning.
- *Private Wealth Management LATAM* provides high-net worth individuals, family members, financial advisors and managers of family offices for high-net-worth individuals/families based in Latin America and Miami technical expertise in key investment and financial performance tools, such as manager evaluation, asset allocation, and a holistic view of a family's assets beyond just the financial or investment side.
- *Mergers and Acquisitions/Private Equity LATAM* provides company executives, current and future board members, owners of closely-held businesses, and their advisors with knowledge of valuation, private equity, and capital markets, and the key skills needed to determine the future value of their strategies.

“The families and their advisors who attend LATAM programs have unique issues that, until now, they have faced alone,” says Christopher Geczy, a finance professor who teaches in three of the LATAM programs who is also the Academic Director of the Wharton Wealth Management Initiative. “These highly complementary programs give them rapid exposure to best practices and valuable networking opportunity. Peers in the program share current challenges and learn from one another. They leave better able to run their businesses, make decisions, and preserve family wealth and harmony across generations.”

All LATAM programs are held at the the Ritz-Carlton Coconut Grove in Miami, Florida. For more information about the programs or to enroll please contact Hernan Fuentes, [Family Business and Office School](#)® at +1.786.307.1015 or by [email](#).

ABOUT FAMILY BUSINESS AND OFFICE SCHOOL

Since 2006, the Family Business and Office School® have been on a mission to train and provide valuable financial, investing and governance education to wealthy families, high net worth individuals and private investors in Latin America and Miami. We are pioneers in providing educational and networking opportunities to the founders, shareholders and next generation of family-owned businesses and private investors. We serve also family office managers, private bankers, wealth advisors, portfolio managers, attorneys, trustees, estate planning advisors, C-Suite, board members and headhunters.

ABOUT THE WHARTON SCHOOL

Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community and one of the most published business school faculties, Wharton creates economic and social value around the world. The School has 5,000 undergraduate, MBA, executive MBA, and doctoral students; more than 9,000 annual participants in executive education programs; and a powerful alumni network of 93,000 graduates.

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