

Private Wealth Management Program for Latin American Managers in January 2014

Miami-based program aims to improve wealth management and asset allocation for family-run firms

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Philadelphia, PA: Nine out of 10 Latin American companies are family-owned firms, yet only 30 percent of these businesses survive to the second generation, according to research conducted by Family Business School, a pioneer in providing private wealth management training and education to this high-net worth demographic in Latin America.

The Wharton School's Aresty Institute of Executive Education, in collaboration with Family Business School, has designed a custom executive education program to meet the challenges of this group. The three-day Private Wealth Management Program takes place Jan. 8-10, 2014 in Miami at the JW Marriott Marquis hotel.

"Our research finds that these family-run firms often lack wealth succession planning and inefficient family and corporate governance," observes Hernan Fuentes, founder of Family Business School based in Miami. "Partnering with Wharton, we will offer these advisors and managers the latest best practices in investing, while showing them how to gain a holistic view of a family's assets." The program targets Latin American wealth management professionals and single family and multi-family office professionals seeking the latest investment tools to further enhance their client relationships.

"We believe this program serves an open need in the industry," says Christopher C. Geczy, PhD, academic director of the Wharton Wealth Management Initiative. "Serving advisors to today's High Net Worth and Ultra High Net Worth investors, this program provides insights in areas ranging from portfolio theory to asset allocation, from client communication to client influence, from traditional investments to alternatives and impact investing." For more information about this program, visit [The Family Business School's Wharton page](#).

ABOUT THE FAMILY BUSINESS SCHOOL

The Family Business School / Family Office & Wealth Management School is the pioneer and leading institution in Latin America and Miami (since 2006). Its mission is to train and offer education to be up to date on the multiple facets for Founders, Shareholders, Next Generation, Family-Owned Businesses, Family Office Managers, Wealth Advisors, Private Bankers and Advisors in General, in subjects as Private Wealth Management, Family and Corporate Governance, Private Equity and Capital Market. FBS offers a series of day-long workshops on a variety of topics of interest to families and advisors throughout Latin America.

ABOUT THE WHARTON SCHOOL

The Wharton School of the University of Pennsylvania — founded in 1881 as the first collegiate business school — is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. The most comprehensive source of business knowledge in the world, Wharton bridges research and practice through its broad engagement with the global business community. The School has 5,000 undergraduate, MBA, executive MBA, and doctoral students; more than 9,000 annual participants in executive education programs; and an alumni network of 92,000 graduates.

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