IBA Institute of Business Administration Karachi
Leadership and Ideas for Tomorrow

IBA CEE Center for Executive Education
Institute of Business Administration

Family Managed Business Program
Workshop on

Wealth Management for Family Owned Businesses

January 28, 2021
Venue: City Campus IBA

Program Overview:

Family-owned businesses are the most widespread form of enterprise; around 90% of the world"s businesses are family controlled, as estimated by The Economist. Family-owned businesses are generally founded by visionary entrepreneurs with meager resources and life-time hard work. It takes generations to build and grow family business. Research shows that only 3% of all family businesses survive beyond three generations. Sustaining and thriving family-owned business for multiple generations is a massive challenge.

This program tackles this challenge head on focusing on the mindset and insight for thriving in uncertain cut-throat competitive environment, beyond survival. As many family businesses transition to new generations of leaders, their success and continuity depend on the leadership effectiveness of those at the top. This workshop covers the full gamut of issues of strategic wealth management from crafting strategy to execution, from conflict resolution to governance, from succession planning to entrepreneurship. Your learning experience will include interactive lectures, case studies and group discussions with peers facing challenges similar to yours.

Who Should Attend?

Family business owners and their generations are highly encouraged to attend. No prior knowledge of finance is required.

How Will You (Participant) Benefit?

- Master the science and art of wealth management in family owned business
- Learn how to be an effective leader with a vision and winning strategy in family business
- Master the critical factors for succeeding your business through generations
- Pave the path towards being a savvy investment professional with advanced analytical skills

Trainers Profile:

Masood Aijazi CFA has over 35 years" experience in finance, investment banking and portfolio management. Masood was the Vice President Business Development & Strategy of NCB Capital Saudi Arabia for 14 years. NCB Capital is the investment banking arm of National Commercial Bank, the largest bank in the Middle East with assets over USD 220 Billion (after acquiring SAMBA).

Masood had been the Investment Advisor of SEDCO Holdings, a leading private wealth management group that manages a wide spectrum of real estate, equities, and other businesses in GCC and the world. Its asset management arm, SEDCO Capital manages assets in excess US$ 5 billion. Before that, he was the Managing Director of, ZAD Investment Company, with AUM of over a billion dollars. Mr. Aijazi was also a partner of Los Angeles based management consulting firm, AJZ & Associates.

Masood had also worked for CBiz Inc. (NYSE: CBZ) a US leading provider of consulting services. CBiz has about 4,800 employees in 100 offices across USA. CBiz is known for its premium outsourced business services and solutions including wealth management, accounting, tax, benefits, insurance, and a wide range of consulting services.
Masood is a CPA (California), CA (Ontario), CMA (US) and CFA charter holder. He received his MBA in Finance from the University of Southern California, Los Angeles USA in 1982, an MBA from IBA Karachi in 1978. Masood is a frequent speaker on Islamic finance, investments, leadership and strategy in international conferences & seminars. He has been the Lead Instructor of Kaplan Schweser CFA Review program Jeddah since 2001, consistently top rated by the students.

Topics Covered:

Being Strategic

- Why family-owned business do not reach their potential?
- Be strategic, be dynamic - only way to survive
- Integration of family and business
- Succeeding through generations
- Governance framework (incl. Shareholders agreements)

Wealth Management

Family capital, Holistic Framework

- Economic engine; sustainable growth
- Diversification
- Spending & charitable giving

Corporate finance

- Optimal capital structuring
- Financial statements and analysis
- Capital budgeting
- Cash flow and working capital management
- Cost of capital and leverage
- Financing growth and retaining control

Saving and Investments

- Investment policy statements
- Asset accumulation cycles
- Portfolio management and optimization
- Asset allocation (strategic and tactical)
- Asset classes; alternative investments incl. Real Estate
- Private equity, venture capital and hedge funds
- Investment styles and strategies
- Managing and evaluating the mutual funds?
- Risk assessment, management and control
- Performance evaluation metrics
- Business vs non business investment

Workshop Fees PKR 25,000/- per participant + 5% SST

Inclusive of Course material IBA Workshop Certificate Lunch Refreshments & Business networking

Experience
EXECUTIVE EDUCATION
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