IBA Institute of Business Administration Karachi
Leadership and Ideas for Tomorrow

IBA CEE
Center for Executive Education
Institute of Business Administration

Wealth Management for Family-Owned Businesses

May 9 & 10, 2024

City Campus, IBA Karachi

Program **Overview**

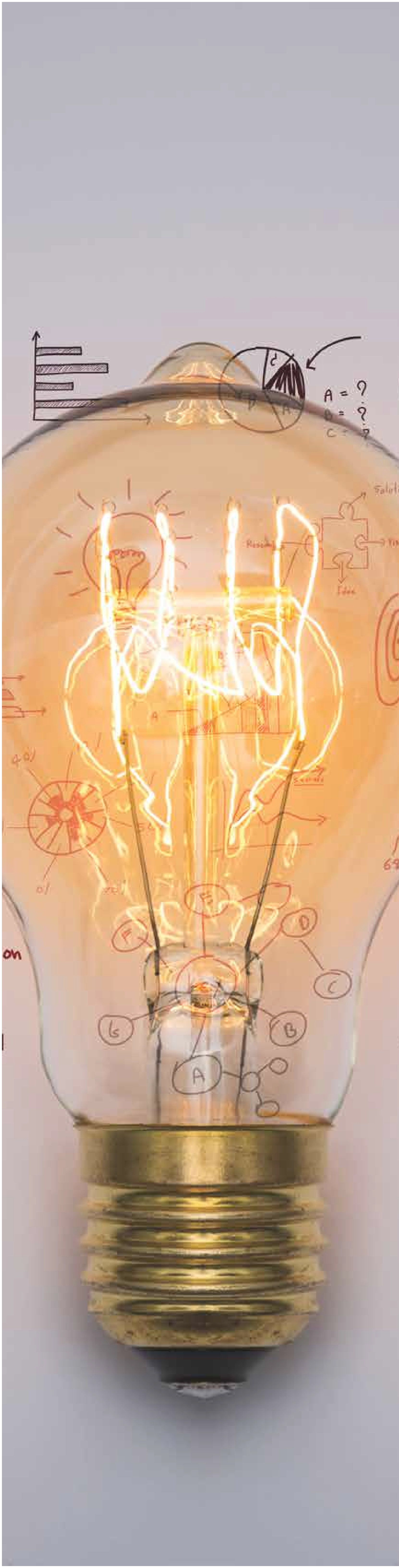
Family-owned businesses are the most widespread form of enterprise; around 90% of the world's businesses are family-controlledAs many family businesses transition to new generations of leaders, their success and continuity depend on the leadership effectiveness of those at the top. This workshop covers 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.

Learning **Outcomes**

By the end of this workshop, participants will be equipped to:

- 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

If you're going to **establish** a system aimed at **spanning generations,** you have to be willing to evolve —— Ennio Mercuri
(Managing Director, Ennio International)



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

30,000+
Participants Trained

16,00+
Training since 2009

225+
Companies

80+
Trainers

Investment
PKR 75,000 + 5% SST

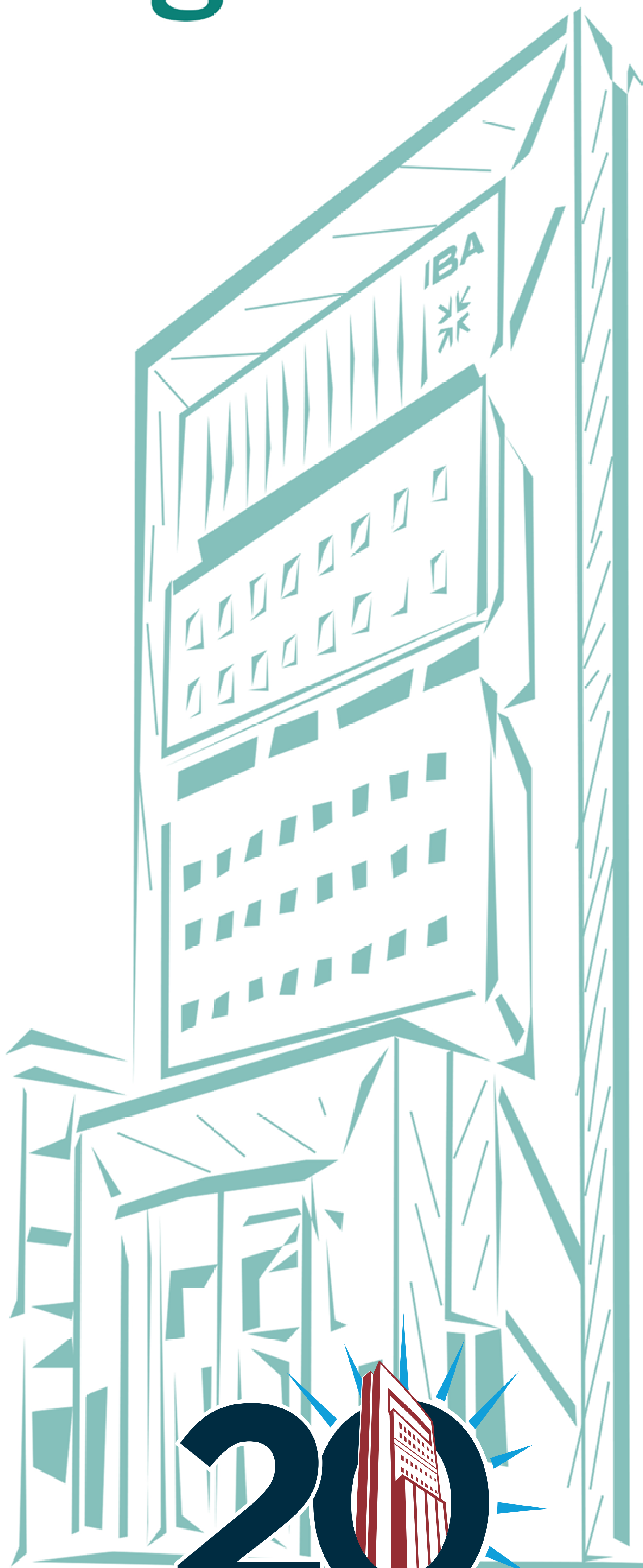
Who Should Attend

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

Masood Aijazi CFA
Former Vice President at NCB Capital

For detailed profile please visit website *cee.iba.edu.pk/faculty*

Our on-demand courses at a glance



SEAMLESS REGISTRATION PROCESS

ACTIVITY BASED TRAINING

EXPERIENTIAL TRAINING

8 - 10 HOUR TIME COMMITMENT

CERTIFICATE OF COMPLETION

BUSINESS NETWORKING

Associate Member
unicon
CONSORTIUM FOR UNIVERSITY EXECUTIVE EDUCATION

Register now

cee.iba.edu.pk/upcoming

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20 YEARS
Shaping Leaders
Empowering Organizations