

Ann Dugan  
Enterprise and Business Advisory Services

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Family



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Ann Dugan launched the first American based entrepreneurship institute at the University of Pittsburgh when she realized that nothing was available locally to families in 1989. This award-winning Institute within the University of Pittsburgh Katz Graduate School of Business, the Institute for Entrepreneurial Excellence (IEE) provides education and experiential learning opportunities to regional family businesses. She was an early innovator in understanding the power of knowledge, research, and entrepreneurship in building enterprising family capacity and sustainability. As the founder and leader of IEE for over 30 years, and in her role as Assistant Dean for the Joseph M. Katz Graduate School of Business, her success in helping families, universities and regions flourish has been recognized with numerous awards, including the 2009 Ernst &Young Regional Entrepreneur of the Year Award.

Her fervent belief is that both the family and the business can thrive with active learning, family honesty, good communication, and appropriate and inclusive governance. Many of the most successful business owning families give Ann and her Institute credit for their family's health and wellbeing today, while also having made timely and good decisions for the future of their business. Her approach has never been cookie cutter but gained through experience and appreciation of being a 4th generation member of a business owning family. Cohesive process is realized once the family builds understanding of their common values and vision for the future as each family is unique in their own way. Appreciating the family where they are today is the foundation of Ann's advisory services as she has dedicated her professional career to assisting many of the world's most substantial family enterprises and family offices as they strive to achieve long-term sustainability and multigenerational success.

Post university, Ann focused her work on assisting families, providing vision and structure to thrive as an enterprising family, a philanthropic family and a family office, as appropriate. In this capacity, Ann's experience included serving as a family advisor with Headwaters SC, an Executive in Residence for the Family Business Network (FBN) and Senior Managing Director of the Family Office Exchange until 2020, when she formed an exclusive partnership with Waldron Private Wealth in Western Pennsylvania.

Ann Dugan is very active in community service and serves on the board of several public and private organizations. Currently, Ms. Dugan Ann sits on the Board of Trustees of the National Philanthropic Trust, a

worldwide leader in donor advised funds under management.

Ann holds an undergraduate degree in Economics and an MBA in Finance from the University of Pittsburgh. Ann is a 4th generation member of a business-owning family within the lumber and building supply industry in southeast Georgia and is a serial entrepreneur who has invested in and grown many ventures to success.