Heather Abramson
Senior Relationship Manager, Family Office Exchange

Heather Abramson is a senior relationship manager for Family Office Exchange (FOX). Part of FOX's family office team, she provides a variety of member services and supports the specific needs for family business-owning members. She also works on FOX's Next Generation Network by engaging younger family members with education and networking.

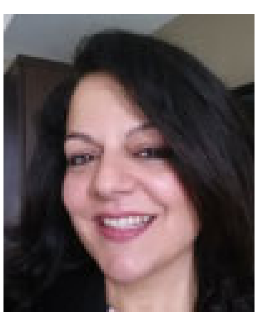
Before joining FOX in 2008, Heather served as strategic marketing and events manager at Aon Corporation for seven years. While at Aon, Heather planned and executed more than 100 large-scale events and created the marketing and project execution for Aon's South America Division. Earlier, she worked on Capitol Hill for a U.S. senator and in the foreign policy department at a lobbyist organization. She also has previous experience working in a Chicago-based family office.

John Cisek
Managing Director, Operations, Family Office Exchange

John E. Cisek is the Managing Director, Operations for Family Office Exchange, overseeing all information technology and office operations for the firm. John brings to FOX over 30 years of experience in the management, planning, development and implementation of information technology systems, both as a consulting professional and as an internal IT executive.

Prior to joining FOX, John was an associate partner with Accenture (formerly Andersen Consulting), where he served in a variety of roles including program manager for a company-wide knowledge management system accessed by over 70,000 users in over 40 countries. He also led the enterprise architecture and security group, with a focus on aligning IT objectives with enterprise objectives.

John holds an MBA in Computer Information Systems from the University of Michigan, and a BA in Finance from Michigan State University. He is also an Illinois certified CPA.

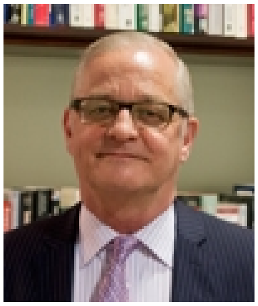


Sandra Ditore
Senior Business Development Manager, Family Office Exchange

Sandra Ditore, Senior Business Development Manager for Family Office Exchange (FOX). Sandra is responsible for identifying prospective family and advisor members, assessing their needs and priorities, and ensuring they have a deep understanding of the benefits of FOX membership. In addition to new member acquisitions, Ms. Ditore is responsible for identifying and securing sponsorship for FOX forums and educational workshops.

Ms. Ditore has more than 20 years of experience in sales and marketing. Before joining FOX in 2002, Ms. Ditore was a senior account manager for a Chicago-based healthcare communications firm, where she developed marketing strategies for global pharmaceutical brands. Prior to this, she held research and marketing positions at several Wall Street investment banking firms including Drexel Burnham Lambert, Dean Witter Reynolds, and Dillon Read & Co.

Ms. Ditore is on the Executive Leadership Team for the Family Firm Institute (FFI) Midwest Chapter. Her involvement includes the development of educational programming for Midwest members.



Steven Draper
Senior Consultant, Family Office Exchange

Steven Draper is a Senior Consultant at Family Office Exchange (FOX). He focuses on the business side of family offices as well as wealth management advisor clients. The emphasis is on solutions to support the integrated financial platform that is key for the Family Enterprise Framework. Steven is also active on the family office research side at FOX to ensure the members have the best available information, resources and solutions to help them streamline their family office processes and technology.

In previous consulting positions, Steven has been involved in single and multi-family office assignments ranging from establishing the basic processes, technology and infrastructure required to operate the family office business through to the implementation of a sophisticated, integrated platform that included CRM, portfolio and partnership accounting, cash management, financial planning, risk management, data warehouse, account aggregation and flexible, on-demand reporting.

Steven has worked for over 25 years in the wealth management, private wealth and family office business in the USA, UK, Switzerland and the Middle East. His skill set covers a broad range and includes: strategy and operations for single and multi-family offices; new business and operational structures; process re-engineering and modeling; suitable technology and latest developments; negotiations of contracts with vendors; program/project management of operational change projects and technology install; writing proposals, plans, standards, procedures and guidelines.

Ruth Easterling
Managing Director, Member Services, Family Office Exchange

Ruth Easterling is Managing Director, Member Services, for Family Office Exchange (FOX). In her role, she provides relationship management for family and advisor members by aligning FOX services with the unique needs of each member. Ms. Easterling also co-moderates the Private Family Trust Company Network and works with the team at FOX to develop relevant programming and insight to the Network.

Prior to her current responsibilities, Ms. Easterling led all of the firm's member services activities, and oversaw the delivery of conferences, educational forums, webinars, website resources and member communications annually. She has overseen marketing and drove the redesign and brand initiative that differentiates FOX today.

Prior to joining FOX, Ms. Easterling worked with the professional services firm Smith, Bucklin & Associates, which provides association management and consulting services to more than 180 associations. She served as executive director to professional associations ranging in size from 300 to 4,000 members. In this capacity, Ms. Easterling re-engineered membership structures and planning processes to better enable organizations to maximize their potential through efficient governance structures and member participation. In addition to client service, Ms. Easterling often consulted with international and national organizations on strategic planning and governance design.

Jane Flanagan
Director of Family Office Research, Family Office Exchange

Jane is the Director of Family Office Research at Family Office Exchange (FOX). Jane has been with the firm since 1993 and has served in a number of roles providing value to FOX members, including Managing Director of Membership, Director of Research, and as a Consultant, advising and counseling family offices and financial institutions on the wealth management process and family office operations.

Jane currently leads the firm's annual Family Office Benchmarking™ research studies and works as a developer, writer and editor of industry white papers and research studies for FOX members. Some of her recent works include: The FOX Guide to the Professional Family Office, Financial Reporting in the Family Office, and 50 Best Practices for an Enduring Family Enterprise. Jane also monitors the FOX listserv and serves as a content resource for the Membership and Consulting Teams at FOX.

Prior to joining FOX, Jane worked as a global custody Relationship Manager at the Northern Trust Company. She served as the liaison between her foundation and endowment clients and the bank, coordinating all of their master custody needs.

Sara Hamilton
Founder and CEO, Family Office Exchange

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX), the definitive source of information and best practices associated with the business of managing the family enterprise and the family's wealth across generations. The strength of the FOX network is derived from the collective knowledge and experience of over 490 globally-minded family enterprises and their advisors based in 20 countries.

Since 1989, FOX has made financial solutions accessible to business owning families by fostering dialogue among wealth owners and wealth advisors. In 2014, FOX celebrated its 25th anniversary of service and remains true to its founding mission of objectivity in wealth management, member education and shared knowledge across a sophisticated global network of families and leading wealth advisors.

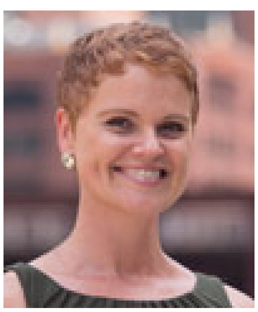
Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times*, © 2010, Wiley & Sons. For the past 10 years, she has served on the Executive Education faculty of the University of Chicago Booth School of Business for the course on Private Wealth Management offered twice a year in Chicago. She is a member of the World Economic Forum's Global Advisory Council on the Future of Investing and a board member for the Private Directors Association.

Ms. Hamilton was recently named one of the Top 50 Women in Wealth Management by PAM and was honored with this award for three years running by Wealth Manager. She serves on the editorial boards of the Journal of Wealth Management and Trusts and Estates magazine.

Amy Hart Clyne
Executive Director, Knowledge Center, Family Office Exchange

Amy Hart Clyne is Executive Director of the Knowledge Center for Family Office Exchange (FOX), supporting the firm's extensive global community of ultra-wealthy families and advisors. Her effort is concentrated on knowledge acquisition, development, management and distribution. Focused on transforming creative, best practice and innovative ideas into practical solutions, Amy collaborates with all of the teams within FOX to ensure that the firm's collective learning is used to enhance existing member relationships, attract new members, and support the work of the consulting practice. Amy is also responsible for program design & development at FOX, including all forums, events and webinars. She is actively engaged in FOX strategic planning, relationship management, marketing and research planning, sales and training meetings, member events and workshops, and new product launch.

Leveraging over 25 years of extensive experience in private wealth management, Amy joined Family Office Exchange in 2012. Over the prior dozen years, she has worked as a consultant to some of the country's leading private wealth management firms and private family foundations. Previously, Amy was appointed Global Marketing Director of The Chase Manhattan Private Bank for seven years. Prior to joining Chase, Amy worked in Marketing and Training at Bankers Trust Private Bank and previously served as a Portfolio Manager for Lehman Management Company, a subsidiary of Lehman Bros. Kuhn Loeb, for six years, in the ultra-wealthy individual area.



Patience Marmer
Senior Relationship Manager, Family Office Exchange

Patience Marmer has been serving as a trusted advisor to UHNW individuals and Family Office clients for seventeen years. For ten years, Patience served in a large SFO where she built bespoke risk management programs for the multi-generational family. Patience created management frameworks for multiple museum quality fine art and valuable collections and was the FO facilitator for multiple special projects ranging from large scale residential construction to risk technology upgrades. Patience was a partner at The Haven Art Group where she was the director of Private Client Practice of Forbes 40 collecting clients and was a fine art claim adjuster to leading collectors, galleries and museums. Her specialties include risk management, fine art and valuable collection management, multi-estate and luxury service operations for the UHNW. Patience studied at the University of Illinois and The Art Institute of Chicago.

Meghan McWalters
International Relationship Manager, Family Office Exchange

As part of FOX's relationship management team, Meghan McWalters provides support to FOX's international family office and advisor members in an effort to build, strengthen and maintain FOX's relationship with its international network. In support of FOX's Market Leaders, she serves as a connector between members, potential members and the resources FOX offers.

Before joining FOX, Meghan worked in development with an international non-for-profit and most recently for the Ann & Robert H. Lurie Children's Hospital of Chicago Foundation as a member of their Donor Relations team.

Meghan holds a Bachelor's degree in International Studies with concentrations in Politics, History and African studies from the University of San Francisco.

Mariann Mihailidis
Managing Director, Councils, Family Office Exchange

Mariann Mihailidis serves as managing director and consultant to family office members of the Family Office Exchange. In her role she oversees the management of all domestic family office relationships. As a practicing tax and estate-planning attorney, she develops strategies in wealth transfer issues, taxes, and corporate structures. Ms. Mihailidis has served as an executor and trustee, and her fiduciary responsibilities included administrative, legal, and accounting duties of various trusts and estates.

Prior to joining FOX in 1996, Ms. Mihailidis worked in one of America's leading family offices for four years as an accounting manager for the family's investment partnerships and operating companies.

Alexandre Monnier
President, Family Office Exchange

Alexandre Monnier is President of Family Office Exchange (FOX). Alexandre oversees FOX globally and has extensive experience in creating, marketing, and delivering premium services to financially successful families in the wealth management, private aviation and healthcare industries—both in the US and internationally.

He joined FOX from PinnacleCare, a leader in private health advisory services, where he led the development of the business in the U.S. and in Europe. Earlier, Alexandre ran Skyjet, Bombardier Aerospace's private jet charter business, transforming the business from an emerging player to a leading private jet travel provider. Previously, he spent 10 years as a management consultant serving some of the most widely recognized firms in the U.S. and Europe on issues ranging from strategy to operational and organizational effectiveness. He started his career in finance with Societe Generale.

Kasey Mueller
Human Capital Network Moderator, Family Office Exchange

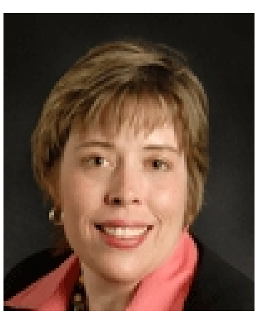
Kasey Mueller has brought to FOX over 30 years of experience in innovative people practices at many organizations. She believes that the role of human resources is one of supporting and facilitating the mission and vision of the organization. Her skill set includes creating and defining performance management systems and processes, talent management, employee engagement, organizational change management, organizational development, instructional design, culture shifting, leadership development, large scale strategic meeting design/facilitation, change management/communication and succession planning.

Marvin Pollack
Director, Marketing, Family Office Exchange

Marvin “Marv” Pollack is managing director of marketing and strategy for Family Office Exchange (FOX).

Mr. Pollack joined FOX in June 2010, has more than 25 years of marketing experience, including 15 years with Leo Burnett Co., where he was responsible for major consumer brands. Later, he worked in the airline and travel industry at Midway Airlines, Hyatt Hotels Corp., and Pitzel & Pollack Advertising, his own agency which specialized in the travel industry. More recently, he was vice president of corporate communications for Océ North America Inc. and senior vice president of marketing communications for comScore Inc.

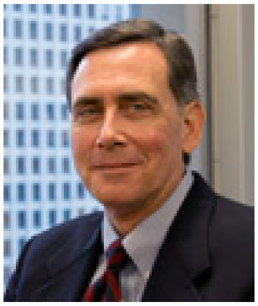
Mr. Pollack holds an AB degree in economics from Princeton University, an MBA from Stanford Graduate School of Business and a certificate in private wealth management from the University of Chicago Booth School of Business. He serves on the board of directors of Marksmen Inc., Windy City Media Group, and Chicago Sinai Congregation.



Karen Rush
Director of Membership, Family Office Exchange

Karen Rush is Director of Membership for Family Office Exchange (FOX). She is part of the advisor team that works to increase membership and provide member services. Formerly events manager, she was responsible for planning all external FOX events, including forums, workshops and regional events.

Prior to joining FOX in 2005, Ms. Rush spent 10 years at a large, multi-generational family office as the communications coordinator. She worked directly with the family office and family members to develop a family meeting process and younger generation education program.



David F. Toth
Director of Advisor Research, Family Office Exchange

David Toth is the Director of Advisor Research at FOX. He harnesses research to develop actionable insights and perform strategic analyses for family offices and wealth management advisor members. Assignments include constructing a roadmap a series of initiatives that assist family offices and wealth advisors in building pricing strategies, elevating client experience, talent management strategies and optimizing team structure and achieving profitable growth. Most recently, he completed “Creating Memorable Client Experiences: Differentiation in the Ultra-Wealth Market,” a report designed to assist advisory firms and families build their own unique client experience programs.

David brings over thirty years of wealth & investment management, marketing and strategic consulting experience to FOX. Over the past fourteen years, he has held key leadership positions at the PNC Financial Asset Management division formulating and implementing growth strategies that helped to more than double the size of their wealth and ultra-HNW businesses. David has played a lead role in the wealth industry through his work on client satisfaction/loyalty, improvements to both the client and advisor experience, pricing strategies, development of new investment products and approaches, and the launch of Wealth Insight® an award-winning blend of technology and advisor/client interaction.

David earned a B.B.A. in Marketing and an M.B.A. in Finance & Economics from University of Michigan and the University of Detroit/Mercy, respectively. In addition, David has completed Leadership and Executive Development programs at the University of Pennsylvania’s Wharton School.