

Presenters



Joel Bosch
Vice President of Finance & Investments
42 North Partners, LLC

Joel Bosch is the Vice President of Finance & Investments at 42 North Partners, LLC. In this role, Mr. Bosch oversees the firm's finance and investing functions including private and public investment strategies, portfolio oversight and management, global asset allocation, performance reporting, wealth planning, tax compliance, and financial reporting. Prior to joining 42 North Partners, Mr. Bosch launched his career at Ernst & Young where he managed a diverse portfolio of private and public clients ranging from global manufacturing companies to regional health systems. Mr. Bosch is a Certified Public Accountant. He earned an MS in Accounting from Michigan State University and a BA in Business from Calvin College. Mr. Bosch has served as a board member and volunteer for a variety of nonprofit organizations in West Michigan.



Paul Bouchey, CFA
Chief Investment Officer
Parametric Portfolio Associates, LLC

Paul Bouchey leads Parametric's Investment, Research and Strategy activities. He is responsible for setting the overall research agenda and new product development. Prior to joining Parametric in 2006, Mr. Bouchey was a senior researcher at Russell Investment Group, where he focused on simulation, optimization, and quantitative decision models for institutional and private clients. He holds a patent on cross-sectional volatility indexing and has authored more than 10 academic and practitioner articles in journals such as *The Journal of Portfolio Management*, *The Journal of Wealth Management*, and *The Journal of Index Investing*.

Mr. Bouchey earned a B.A. in mathematics and physics from Whitman College and an M.S. in Computational Finance and Risk Management from the University of Washington. He is a CFA® charter holder.



Michele Demers
Founder & CEO
Boundless Impact Investing

Michele Demers has 20 years of experience as a philanthropy executive, strategist, and social entrepreneur. She is Founder and CEO of Boundless Impact Investing, a market intelligence platform that provides high-quality, objective, and actionable research and tools to family offices and private investors interested in maximizing the social and environmental impact of their investments.

From 2010-2013, she was Vice President at Foundation Source where she built a knowledge platform on best practices in philanthropy that was used by a network of 1,200 family foundations. From 2007-2008, Ms. Demers was the Director of Communications for Humanity United, a humanitarian foundation created by Pam Omidyar and eBay founder Pierre Omidyar. She was involved in the successful development of more than two-dozen philanthropic and social enterprises, including her own, Tattersall Consulting, from 2002 to 2007.

Ms. Demers is a graduate of Pennsylvania State University and has a M.A. in International Relations and Communications from Boston University.



Lesley-Jane Dixon
SVP/CIO
Clark Enterprises, Inc.

Lesley-Jane Dixon leads CEI's Investment Management Group which manages the firm's financial market investment portfolios. Prior to joining CEI in 2007, Ms. Dixon was a Partner and Portfolio Manager at Lord Abbett where she focused on Small- and Micro-Cap strategies. She developed a robust skill-set over a 20 year career on Wall Street that centered on research, analysis and portfolio management.

Active in her community, Ms. Dixon served as Treasurer on the board of directors for the Nonprofit Village and as a board member for the Community Foundation for Montgomery County. Additionally, she is on the Investment Committee for Safe Shores - The DC Children's Advocacy Center, and mentors and sponsors a scholar through Generation Hope.

Ms. Dixon earned the Chartered Financial Analyst (CFA) designation and the CIPM (Certificate in Investment Performance Measurement) designation. She is a graduate of Wake Forest University with a B.S. in Business and resides in Washington, D.C.



Matt Hougan
Global Head of Research
Bitwise Asset Management

Matt Hougan is the Global Head of Research for Bitwise Asset Management, creator of the world's first cryptocurrency index fund. In that role, he helps create and refine the index methodologies that underlie Bitwise's investment products and conducts fundamental research into the role cryptoassets can play in a diversified portfolio. His work and thoughts on crypto have been profiled in *Barron's*, *Bloomberg*, *Institutional Investor*, *CNBC*, *WealthManagement.com*, *ThinkAdvisor*, *Business Insider* and many other publications.

In addition to his role at Bitwise, Mr. Hougan is Chairman of Inside ETFs, producer of the world's largest ETF conferences. He was previously CEO of Inside ETFs and before that CEO of ETF.com. He led the development of the world's first institutionally oriented ETF ratings system, co-authored the CFA Institute's "Monograph on ETFs" and is a three-time member of the Barron's ETF Roundtable.

Mr. Hougan serves on the Board of Directors of Equobot, creator of the world's first artificial-intelligence-driven family of ETFs, and is an advisor to StratiFi, which uses machine learning, data science, automation and design to help investors identify and mitigate hidden risks in their portfolios.



Lori D. Mills, CFA
Managing Director
Asset Consulting Group

Lori Mills is a Managing Director and member of the Asset Consulting Group's executive team, which sets the course and direction of the firm. Ms. Mills is also a member of Asset Consulting Group's Investment Committee, which establishes the framework for the firm's investment philosophy and oversees the internal processes used to ultimately make investment recommendations to clients. She also works closely with a variety of clients to develop investment policy, and to design and construct portfolios.

Prior to joining the firm in 2003, Ms. Mills served as Director of Research for Capital Advisory Group in Richmond, Virginia. Prior to her role at Capital Advisory Group, she served as Treasury Manager for the University of Wisconsin System Trust Funds.

Ms. Mills holds a B.S. in Finance and Business Economics from Southern Illinois University and an M.S. in Finance, Investment and Banking from the University of Wisconsin. She is a holder of the Chartered Financial Analyst designation and a member of the CFA Society of St. Louis and the CFA Institute.



Joseph F. Nugent
Director
Asset Consulting Group

Joseph Nugent joined Asset Consulting Group as an Analyst in their research group in 2005. He oversees the analysis, due diligence and reporting on illiquid investment strategies including real estate and private equity investments. He also participates in ACG's Investment Committee, which establishes the framework for the firm's investment philosophy and oversees the internal processes used to ultimately make investment recommendations to clients.

Prior to joining ACG, Mr. Nugent performed in several roles for State Street Corporation, including serving as an Analyst specializing in mutual fund valuation issues. He has over 13 years of experience in the financial services industry.

Mr. Nugent is a graduate of Avila University with a B.S. degree in Accounting.



Daniel Pound
Head of AG Europe & Co-Portfolio Manager, Distressed Debt
Angelo, Gordon & Co.

Daniel Pound joined Angelo, Gordon's London office in 2005 and is the firm's Head of Europe. Mr. Pound is a Managing Director, leads the European Distressed Debt investment team, and is also a member of the firm's executive committee. He is co-portfolio manager for the firm's distressed funds. Prior to joining Angelo, Gordon, Mr. Pound was an adviser at Close Brothers Corporate Finance focusing on creditor side restructuring and mid-market mergers and acquisitions.

Mr. Pound is a qualified chartered accountant (A.C.A.) having worked for KPMG in London and New York. He holds a BSc degree from University of London and an Executive M.B.A. degree issued jointly by the University of Edinburgh and ENPC (Paris).



Michael Smith
Partner, Co-Head of Credit Group
Ares Management, L.P.

Michael Smith is a Partner and Co-Head of the Ares Credit Group and a member of the Management Committee of Ares Management. He additionally serves as Co-President of ARCC. He is a member of the Ares Credit Group's U.S. Direct Lending and Commercial Finance Investment Committees and the Ivy Hill Asset Management Investment Committee. Prior to joining Ares in 2004, Mr. Smith was a Partner at RBC Capital Partners, a division of Royal Bank of Canada, which led the firm's middle market financing and principal investment business. Mr. Smith joined RBC in October 2001 from Indosuez Capital, where he was a Vice President in the

Merchant Banking Group. Previously, Mr. Smith worked at Kenter, Glastris & Company, and at Salomon Brothers Inc., in their Debt Capital Markets Group and Financial Institutions Group.

Mr. Smith received a B.S. in Business Administration, cum laude, from the University of Notre Dame and a Masters in Management from Northwestern University's Kellogg Graduate School of Management.



Tod Trabocco, CFA
Head of Private Credit Research
Cambridge Associates, LLC

Tod Trabocco is a Managing Director at Cambridge Associates based in Boston. He oversees the firm's private credit efforts, performing due diligence on investment opportunities in structured equity, credit, and distressed markets, as well as monitoring investment firms and their portfolio companies. Mr. Trabocco co-chairs Cambridge Associates' Credit Investment Research Committee and co-leads the firm's Credit Investment Group's manager research and selection and provides specialized credit services to clients.

Before joining Cambridge Associates, Mr. Trabocco was a Managing Director with Kayne Anderson Capital Advisors' middle market mezzanine strategy in New York. Previously, he was a Managing Director at LBC Credit Partners, Inc., where he started and led LBC's research and underwriting practices, and was a member of the firm's Investment Committee. He also was Vice President and Senior Analyst at Moody's Investors Service where he developed a new quantitative scoring method for state-level issuers.

Mr. Trabocco is holder of the Chartered Financial Analyst designation. He received a M.B.A. from Columbia Business School, a M.A.L.D. in Development Economics from The Fletcher School, Tufts University and a B.A. in Government from Pomona College.



Mac Van Wielingen
Founder and Director
ARC Financial Corp.

Mac Van Wielingen is a veteran energy executive, private equity investor, corporate director, and philanthropist. He is a founder and director (1989 - Present) of ARC Financial Corp., the largest private equity investment management company in Canada focused on the energy sector; and a founder and former Chair (1996-2016) of ARC Resources., a leading Canadian oil and gas producer. Mr. Van Wielingen is the former Chair (2014 - 2017) of the Board of Alberta Investment Management Corporation (AIMCo), where he joined as an original director in 2007. He is also the Founder and Chairman of Viewpoint Group, a private family owned group of companies, which includes Viewpoint Foundation, Viewpoint Research and Viewpoint Investment Partners Corporation.

A strong advocate for advancing business leadership and corporate governance, Mr. Van Wielingen co-founded the Canadian Centre for Advanced Leadership (CCAL) at the Haskayne School of Business at the University of Calgary in 2012, where he continues to serve as Chair of the External Advisory Group. Mr. Van Wielingen's passion for learning and sharing keeps him active in speaking engagements, writing pursuits and community events; with the goal of advancing dialogue and catalyzing positive change among directors and business leaders.

Mr. Van Wielingen is an honors graduate of the Ivey School of Business and has studied post-graduate economics at Harvard University.



Rob Van Wielingen, CFA
President
Viewpoint Investment Partners Corporation

Rob Van Wielingen is President of Viewpoint Investment Partners Corporation (VIPCo), a Calgary-based investment firm with a disciplined, rules-based approach to portfolio management. With a passion for increasing transparency and accessibility for all investors, Mr. Van Wielingen and the VIPCo team manage a systematic, global multi-asset strategy with nearly \$300M in assets under management, on behalf of family offices and UHNW families across Canada.

Mr. Van Wielingen has extensive experience in the finance, technology, and renewable energy sectors. He has been with the Viewpoint Group since 2010, where he manages his family's real estate, energy, alternative, and public market portfolios.

Mr. Van Wielingen holds a Bachelor of Commerce with Distinction from the University of Victoria, is a CFA Charterholder, and is a registered Portfolio Manager in Alberta, British Columbia, and Ontario.



Mark W. Yusko
Founder, CEO and Chief Investment Officer
Morgan Creek Capital Management, LLC

Mark W. Yusko is the CEO and Chief Investment Officer of Morgan Creek Capital Management, LLC, a registered investment adviser formed in July 2004 to provide investment management services based on the University Endowment Model of investing to wealthy families, individuals and institutional investors.

Prior to forming Morgan Creek, Mr. Yusko served as the Chief Investment Officer for the University of North Carolina at Chapel Hill (UNC) from 1998 to 2004. Mr. Yusko, and his team, founded the UNC Management Company (UNCMC) in July of 2002 to provide comprehensive investment advisory services to the University including strategic and tactical asset allocation, investment manager selection, manager performance evaluation, spending policy management and performance reporting.

Prior to joining UNC, Mr. Yusko was the Senior Investment Director for the University of Notre Dame Investment Office, where he joined as the Assistant Investment Officer, in October of 1993. He worked with the Chief Investment Officer in all aspects of Endowment Management including asset allocation, investment manager selection, manager performance evaluation, spending policy management and reporting to the Board of Trustees. He is an Advisory Board member of a number of private capital partnerships and alternative investment programs and has served as a consultant on alternative investments to a select group of institutions. He is currently a Board member of the MCNC Endowment and President and Chairman of the Investment Committee of The Hesburgh-Yusko Scholars Foundation at the University of Notre Dame, and President and Head of Investment Committee of the Morgan Creek Foundation which he established with his wife Stacey in 2005.

Mr. Yusko received his B.S., with honors, in Biology and Chemistry from the University of Notre Dame in 1985 and a M.B.A. in Accounting and Finance from the University of Chicago in 1987.

Family Office Exchange Staff



Sara Hamilton
Founder and CEO

Founder and CEO of Family Office Exchange, Sara is a recognized visionary in the private wealth community. While a trust officer at Harris Bank in Chicago in the late 1980s, Sara witnessed the emergence of family wealth management as an industry. Hundreds of U.S. families became centi-millionaires overnight through leveraged buyouts that spawned private financial offices commonly called family offices, to manage family assets and educate wealth owners. Sara was the first professional to recognize family offices as a complex and unique market segment in wealth management.

Sara founded Family Office Exchange (FOX) in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions and educating family members on responsible ownership. As a result, FOX expanded the member network to include educational workshops and strategy consulting for family enterprises, and a network for making direct investments in operating companies was added in 2010.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives and wealth advisory firms in more than 20 countries. FOX has built a unique team of professionals serving multi-generational families, led by 15 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, Sydney and Madrid.

Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times*, and serves on the executive education faculty of the University of Chicago Booth School of Business where she is an adjunct faculty member for their Private Wealth Management course, offered twice per year in Chicago. She is on the founding boards for the International Private Directors Association in Chicago and the Foundation for Gender Equality in New York.



Paulina Cromwell, CFA
Product Manager, Knowledge Center

Paulina is responsible for client education, advisory, and research related to Impact Investing & Philanthropy at Family Office Exchange (FOX). Paulina cares deeply about helping families align their activities with their values. She works with families to achieve their goals across the family enterprise, including charitable giving, impact investing, and business initiatives.

Paulina also brings valuable investment expertise to FOX, with portfolio management experience across the capital spectrum. She works with some of FOX's most sophisticated investment clients on complex analysis and deep investment issues, in addition to providing investment education and insights across the membership base.

Prior to joining FOX, Paulina was a portfolio manager in the Family Office Investment Advisory Practice at Northern Trust. She worked with family offices and their foundations on investment strategy, asset allocation, portfolio construction, and cash flow planning. She also led the team that conceived Northern Trust's Family Office Consulting business. She began her career in Corporate Strategy, focused on the company's M&A activities and the annual Strategic Plan with the Board of Directors.

Paulina believes in aligning business activities with personal and organizational values. She was a founding member of Northern Trust Asset Management's Female Development Group, created to address gender equality and engagement in the investment business. She also helped develop a proprietary diversity scoring methodology for investment managers which resulted in the creation of an Equality-Focused mutual fund.

Paulina received a Bachelor's of Science Degree in Finance from Florida State University, with a Minor in History. She is a Chartered Financial Analyst® (CFA) charterholder and a member of the CFA Society Chicago. She is also involved with several mentorship and financial coaching organizations throughout the Chicago area.



Sandra Ditore
Regional Director, Membership Development, East

Sandra Ditore is the Regional Director, Membership Development, East for Family Office Exchange (FOX). In her role, 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, Sandra is responsible for identifying and securing sponsorship for FOX forums and educational workshops.

Sandra has more than 20 years of experience in sales and marketing. Before joining FOX in 2002, Sandra 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.



Ann Dugan
Senior Managing Director, Advisory Services

Ann Dugan, as Senior Managing Director of Advisory Services, leads the FOX practice team in the outstanding delivery of consulting to many of the world's most substantial family enterprises and family offices as they strive to achieve long-term sustainability and multi-generational success.

Ann is best known as the founder and leader of the Institute for Entrepreneurial Excellence University of Pittsburgh which she led as executive director for nearly 30 years while concurrently serving as Assistant Dean for the Joseph M. Katz Graduate School of Business. During this time, Ann built a dynamic membership comprised of entrepreneurs as well as multi-generational families engaged in growing and sustaining their wealth and their businesses while also planning and preparing for the next generation of family and business leadership.

In 2014, Ann orchestrated her own succession to ensure the lasting and ongoing success of the Institute. Afterwards, she continued to consult with substantial global families via Headwaters SC Family Advisory which was sold to Ernst and Young in 2017. During this time, Ann was also an Executive in Residence for Family Business Network (FBN).

Ann is very active in community service and philanthropic boards and has a variety of interests, specifics of which can be viewed on her LinkedIn profile. Ann was recently elected to the board of the National Philanthropic Trust. She has a B.S. in Economics and M.B.A. in finance from the University of Pittsburgh.

Ann's entrepreneurial success has been recognized by many awards including the 2009 Ernst & Young Regional Entrepreneur of the Year Award. Ann is a fourth generation member of a business-owning family within the lumber and building supply industry in southeast Georgia and is a serial entrepreneur who has founded and led several ventures to success.



Charles B. Grace, III
Managing Director

Charles B. Grace, III is a Managing Director at Family Office Exchange (FOX). He works on consulting projects for families and family offices as well as wealth management advisor clients. Assignments have included work on family office and family enterprise design and review, family governance and protocols, advisor selection, best practices and benchmarking, among others. Charlie is also active on the family and advisor membership and research side at FOX.

Charlie has been active for 20 years in the family office community advising ultra-wealthy families and serving as a resource to multigenerational families and family offices. He advised on investment portfolios and wealth management generally for almost 10 years working day-to-day at the multi-family office Ashbridge Investment Management LLC and the single family office Ashbridge, LLC. His responsibilities included client relationships, business development, and membership on the firm's investment committee, as well as business operations and firm strategy as Chairman of the Management Committee of the \$1 billion investment advisory firm. He still serves on the Board of the single family office Ashbridge, LLC. Charlie has been quoted in various publications on the subject of private wealth, including *The Wall Street Journal*, *Financial Times*, and *New York Times* and presented at many conferences focused on private investors and family offices.

Charlie is on the Executive Committee and serves as Treasurer and Investment Committee member of the nonprofit Tuttle Fund, Inc. He graduated from the Washington College of Law with a J.D. He received a B.A. and M.A. in history from Bates College and the American University, respectively.



Nate Hamilton
Advisory Board Member

Nate is currently Co-Founder and Managing Partner of Heritage Partners Group, a private equity investment and operations platform focused on the acquisition and roll-up of consumer retail and information services businesses. Nate has significant experience in partnering with and investing alongside private family capital and family-owned businesses. Prior to founding Heritage, he worked in investment banking, sales and trading and private equity across several institutions including Goldman Sachs, UBS and as a co-founder of FDX Capital, a direct-investment platform built for FOX family offices. Nate currently sits on the Advisory Board of Family Office Exchange and is a consultant to the Direct Investment Network. He earned his Bachelor's degree in Economics from Vanderbilt and an M.B.A. from the University of Chicago Booth School of Business.



Vincent Hayes
Director of Member Development

Vincent Hayes is the Director of Member Development at Family Office Exchange (FOX). Vincent serves as the ambassador for FOX in reaching out to new members, promoting the networking and education benefits that come with FOX membership. He helps prospective members find ways to solve the challenges they face in running their family enterprises using resources available within FOX and its membership community.

Prior to joining FOX, Vincent spent 15 years in the investment world, most recently with AGN Futures, where he has served as Vice President of Sales & Operations since 2011. Previously, Vincent has worked at R.J. O'Brien & Associates, Global Forex Trading, and ZAP Futures. Vincent is a graduate of Western Michigan University with a B.B.A. degree in Finance with a minor in Accounting. He is based in Chicago.



Kristi Kuechler
Managing Director, Investor Market

Kristi Kuechler is actively involved in development of all investment-related programming and investment initiatives at FOX, and is based in San Francisco.

Kristi joined FOX after five years as Partner and Managing Director of Lattice Strategies, an investment firm based in San Francisco. Prior to her work at Lattice, Kristi served as President of the Institute for Private Investors (IPI), where she was responsible for content and curriculum development and oversaw all matters related to membership. She also created the Private Wealth Management program offered at Stanford University and ran it for three years.

Kristi has a B.A. from University of California-Davis, and a M.A. in educational policy from Stanford University.



Alexandre Monnier
President

Alexandre Monnier is President of Family Office Exchange (FOX), a global organization that helps wealthy families and their advisors master the unique challenges inherent to wealth ownership. FOX's support includes networking opportunities, knowledge, advice and education on key topics such as managing wealth, family governance, legacy, succession and best practices for running family offices.

Alexandre oversees FOX globally and has extensive experience in creating, marketing, and delivering premium services to families of wealth in the wealth management, private aviation and healthcare industries—both in the U.S. 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, Alexandre 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 Société Générale.

Alexandre is a graduate of ESCP Europe, one of Europe's leading business schools. He has been a member of Young Presidents' Organization since 2005.



David F. Toth
Managing Director

David Toth is a Managing Director at FOX. In his role, he harnesses proprietary and non-proprietary research to develop actionable insights and perform strategic analyses for family offices and wealth management advisor members. Assignments include constructing a pathway 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.

Mr. Toth brings over thirty years of wealth and investment management, marketing and strategic consulting experience to FOX and its members. Over the past fourteen years he has held key leadership positions in the Asset Management Division at PNC Financial formulating and implementing growth strategies that helped to more than double the size of their wealth and ultra-HNW businesses.

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