Cassie Atteberry
Principal, Talent Outside the Lines

Cassie Atteberry is a Principal with Talent Outside the Lines. She is an HR leader with over 20 years in helping make the people stuff easier. Cassie spent 21 years in HR at Hallmark Cards, Inc, where she specialized in helping achieve their business strategy by getting the right structures, processes, cultures, talent, and talent processes in place. As a member of the HR executive team she influenced strategy, policy, and the employee experience, becoming known as a champion for diversity, equity and inclusion. A significant portion of her time was spent coaching employees, managers and working with executive leadership teams. During this tenure she was also the dedicated HR support for Chinquapin Trust Company, the family office established by Hallmark's founders.

Cassie recently left Hallmark to start her own consultancy, Talent Outside the Lines, which helps family offices maximize the value of their people portfolio via coaching, building culture, strategic HR and organizational planning, and team and talent development.

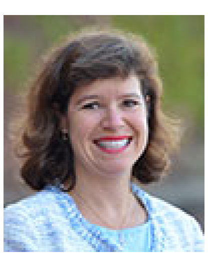
Cassie holds a master's degree in Human Resources and Industrial Relations from the University of Minnesota, and a Bachelor's degree in Communications from the College of St. Catherine.

Ken Cameron
Director, Grant Thornton, LLP

Ken Cameron is a Director in Grant Thornton's Human Capital Services Consulting Practice. Ken is based in Atlanta and serves as a regional compensation leader. He has more than 25 years of compensation and human resources leadership experience in both the consulting and corporate environments. Prior to joining Grant Thornton, Ken was with Towers Watson, and was a compensation and benefits leader for a global telecommunications company. Ken has conducted compensation design and review assignments with a wide spectrum of industry experience.

Ken has earned the designation of Certified Compensation Professional from World at Work and is also certified as a Professional in Human Resources (PHR) with the Society for Human Resources Management. In addition, Ken has been a featured speaker for numerous compensation, human resources, and financial organizations and a contributor to publications such as *The Wall Street Journal, Crain's New York Business, The Financial Times, Bloomberg BNA, the Atlanta Business Chronicle and Accounting Today.*

Ken has a Master of Science in Industrial Relations from Loyola University's Institute of Industrial Relations. He received his Bachelor of Arts degree in Psychology from the University of Rochester.



Katherine Dunlevie
Managing Director and Executive Vice President, The Family Office at Synovus

Katherine Dunlevie leads The Family Office at Synovus, which provides family office services to 75+ ultra-high net worth families and administers more than $7 billion in assets. She directs all aspects of The Family Office at Synovus with a focus on client service, new business development, long-term business strategy, and financial performance. Katherine also leads collaborative efforts to plan, develop, and implement strategies that deliver exceptional services in support of family enterprises. Katherine's entire career in financial services has been with Synovus. Prior to joining the Synovus family in 2002, she served with Cru, formerly known as Campus Crusade for Christ, at the University of Georgia.

Katherine earned a Bachelor's degree in Exercise and Sports Science from the University of North Carolina at Chapel Hill, where she graduated with Highest Distinction. In addition, she is an Honors Graduate of the Cannon Trust School. Katherine's certifications include Certified Financial Planner™ (CFP®), Certified Trust and Financial Advisor (CTFA), and Chartered Financial Consultant® (ChFC®). She also is a member of the Financial Planning Association.

Catherine Garner
Head of Technology, Walton Enterprises

Catherine Garner joined Walton Enterprises (WEI) in December of 2019 as the Head of Technology to drive digital transformation. Prior to WEI, Catherine was at Walmart for over 10 years where she provided global technology leadership in various areas including Technology Modernization, U. S. and International Strategic Programs, Quality Assurance, Store Systems Planning & Product Management, and Replenishment Technology Operations.

Catherine's career spans 25+ years in technology. As an avid problem solver, she gravitated to the study of computer science and received her B.S. at the University of Louisiana. Catherine's fascination with technology transformation has been a common theme in prior leadership roles at a diverse group of industries (retail, oil & gas, utility, technology, manufacturing). The thrill of leveraging new technologies to deliver innovative solutions and working with outstanding global talent has been a constant, motivating force. In 2017, Catherine was honored as an Inspiring Woman Technology Leader at Walmart.

Catherine's love of technology is second only to mentoring and developing others to enrich their careers and lives. She has gained an incredible sense of fulfillment from helping women of all ages tackle personal and professional challenges. Catherine has served in various leadership roles for Girl Scouts, Walmart Women in IT, Million Women Mentors, Lil Miss Coder, Dress for Success, CARE Community, Youth Strategies, and the American Heart Association.

Robert Gray
Assistant Vice President, Enterprise Operations and Executive Security, Cox Enterprises, Inc.

Robert Gray is the Assistant Vice President, Enterprise Operations and Executive Security for Cox Enterprises which includes management of the protection of the Cox Family Office and business executives worldwide. Responsibilities include executive protection, protective intelligence, physical security & operations, investigations, risk mitigation, enterprise business continuity programs and disaster recovery.

Previously, Robert was the Director of Global Security for Novelis Inc. Duties included managerial oversight for global physical security, executive protection, business intelligence and threat assessment and crisis management. This role included the creation and formation of the international security department. Formerly, Robert was the Director of International Security and Government Initiatives for Western Union. Robert also served as a Special Agent for the United States Secret Service for 10 years and has served in undercover roles for international terrorism and financial investigations as well as the Public Information Officer for Media Relations and protective intelligence roles. Robert was also a police officer for six and a half years outside of Chicago, specializing in gang intervention.

Robert earned his B.A. and M.A. from North Central College, Naperville, IL in Business and Futures Analysis respectively. Rob has also been an adjunct graduate professor for Bellevue University for the security management program for 13 years.

Mark Harder
Partner, Warner Norcross & Judd LLP

Mark Harder is the Partner and Chair of Warner Norcross & Judd's Private Client and Family Office Group. He has dedicated his practice to counseling and representing high net worth individuals, families, family businesses and their owners, and closely held businesses. He provides his clients with estate planning and estate settlement services, advises on family business succession planning matters, represents family and closely held businesses in their day to day business matters, and serves as an adviser and counselor on legal matters to businesses, individuals, and their families.

Mark chaired the Probate and Estate Planning Section of the State Bar of Michigan and also the State Bar of Michigan committee that spent more than five years writing the Michigan Trust Code, which governs how trusts are established and administered in the state. He is a Fellow of the American College of Trust and Estate Counsel.

Neil Kreuzberger
President and Founder, Kreuzberger Associates, LLC

Neil Kreuzberger is the President and Founder of Kreuzberger Associates, LLC and has fostered the development of client relationships across many practice areas, including financial services, brokerage, investment management, technology, manufacturing, telecommunications, distribution, real estate, and retail. Most recently, Neil has led the development of the firm's specialization in financial leadership searches for private foundations and multi-family offices. With over thirty years in the public accounting, technology, venture capital, real estate and executive search industries, Neil's experience is an invaluable resource to the Kreuzberger Associates team. He started his career with KPMG Peat Marwick in San Francisco, and spent three years auditing technology, real estate, and manufacturing-driven companies. Prior to entering the executive search profession, he served as CFO for Walker Interactive, a $30 million venture capital-financed supplier of financial application software. Neil holds an M.B.A. in Accounting and Finance from UCLA and is a licensed (inactive) CPA in California.

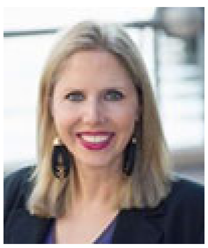
Robert E. Mallernee, CPA, CFA
Chief Executive Officer & System Designer, Eton Solutions, L.P.: Founder and CEO, Eton Advisors Group, LLC

Rob has more than 30 years of experience in advising closely held businesses, senior corporate executives, entrepreneurs, venture capitalists and wealthy families by building comprehensive, multi-generational investment, financial, and estate plans. Prior to co-founding Eton Advisors and Eton Family Office System, he served as head of the UBS Multi-Family Office Group. Earlier in his career, Rob served as a founding principal of the US Trust Multi-Family Office and as head of the Private Asset Management Group at NC Trust Company, which was sold to US Trust in 1999. Rob began his career at Arthur Andersen and Price Waterhouse in North Carolina and Chicago, where he was a Senior Tax Manager. Rob co-teaches a graduate-level course Personal Investing & Wealth Management at the University of North Carolina's Kenan-Flagler Business School. He is a Certified Public Accountant and Chartered Financial Analyst. Rob holds an MBA in International Business & Finance from the University of Chicago and a BS from the University of North Carolina at Chapel Hill.

Lisel Morris
Branding, Strategic Projects Manager, AMS Hospitality

Lisel Morris recently joined Atlanta-based hotel development firm, AMS Hospitality, as the head of branding. AMS Hospitality (AMSH) represents a strategic joint venture of two premier real estate owners and developers, Stormont Hospitality Group (SHG) and The Allen Morris Company (AMCO), who have partnered to develop and acquire strategically-located hospitality properties throughout the United States.

Prior to joining AMSH, Lisel oversaw Investor Relations at The Allen Morris Company: focusing specifically on investment partnerships with family office and high net worth individuals. Apart from five years with AMCO, Lisel has worked in real estate private equity for Equity International; with a boutique mixed-use developer in Denver, Colorado; and completed her Master of Business Administration from the University of Colorado with a focus on Real Estate Development and Investment.



Arden O'Connor
CEO, O'Connor Professional Group

Arden O'Connor founded the O'Connor Professional Group to address the needs of families and individuals struggling with an array of behavioral health issues, including addiction, mental health disorders, eating disorders, learning, and other developmental challenges. With several relatives in recovery, Arden is passionate about helping families and individuals navigate the highly fragmented treatment system in a way that creates positive outcomes and allows families to heal. Arden is a graduate of Harvard College and Harvard Business School. She remains heavily involved in community activities, as a board member of Winsor School Corporation, Collaboration for Family Flourishing, Massachusetts Association of Mental Health, and Attorneys for Family Held Enterprises. Previously, she served as a board member for the Justice Resource Institute (former chair), C4 Recovery Solutions, Harvard Club of Boston, Victory Programs, and Harvard Business School Alumni Association of Boston. She maintains professional affiliations with the following organizations: Boston Estate Planning Council, Worthy Circles and Family Firm Institute.

Katherine Richardson
EVP, Chief Human Resources Officer, PURE Insurance

Katherine has over twenty-five years of experience as a senior HR leader in the insurance industry. As EVP, Chief Human Resources Officer for PURE, Katherine is responsible for developing core people strategies to build upon the workplace culture that has driven PURE's tremendous success. Before joining PURE three years ago, Katherine served as the Global Head of Human Resources at Allied World, a global specialty property-casualty insurer and reinsurer. Over 10 years with AIG, Katherine held various field and home office HR leadership roles in New York, Atlanta, and Boston. She is a graduate of Texas A&M University.

Jamie Sanders
Partner, Tax, Private Client Services, RSM

Jamie Sanders is a Partner with RSM's Private Client Services Practice working within the RSM Ultra-High-Net-Worth Team. Her team focuses on corporate executives and entrepreneurs who have had a liquidity event and have significant investable assets. She specializes in income tax planning for individuals, trusts, and investment partnerships, as well as leads the specialty practices dealing with estate and gift tax planning and charitable planning.

Rob Storrick
Manager, Human Capital Services, Grant Thornton LLP

Rob Storrick is a Manager at Grant Thornton who specializes in executive and broad-based compensation consulting. Rob has experience working with family offices of varying size and complexity, as well as non-family office organizations, such as publicly traded companies and other private organizations.

Kyle Yost
Finance Manager, Rock Ventures LLC

Kyle Yost is the Finance Manager at Rock Ventures in Detroit, MI. His main areas of focus include portfolio operations, financial reporting, and technology solutions. He is responsible for facilitating communication between senior leadership and portfolio companies and engaging in special projects for venture startups in the portfolio.

Prior to joining Rock Ventures in 2018, Kyle spent time at JPMorgan Chase in the Corporate Technology and Cybersecurity organizations, as well as at Ernst & Young in the Supply Chain Advisory Services and Performance Improvement groups. Kyle received his bachelor's degree in Operations Research & Engineering from Cornell University.

Heather Abramson
Director, Relationship Manager

Heather Abramson is the Director, Relationship Manager for Family Office Exchange (FOX). In her role, Heather works with business-owning family members to understand their objectives and provides guidance to help address their unique needs through the resources available at FOX. Heather also runs FOX's Rising Gen Community, which is designed to provide next-generation family members an opportunity to learn, share experiences, and develop skills as future leaders. Heather has held multiple roles at FOX including membership development.

Before joining FOX in 2008, Heather served as Strategic Marketing and Events Manager at Aon Corporation. 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 in her career, she worked on Capitol Hill for a U.S. senator and in the foreign policy department at a lobbying organization. She also has previous experience working in a Chicago-based family office.

Heather has a B.A. degree in Journalism, Public Relations, and Political Science from the University of Wisconsin-Madison. She graduated with honors from DePaul University with an M.A. in Organizational and Multi-cultural Communications.

Mindy Kalinowski Earley, CMP, CFBA
Chief Learning Officer

Mindy Earley is Chief Learning Officer for Family Office Exchange (FOX). In her role, she works to foster integrated learning programs for enterprise families and is responsible for developing the family learning community. She also provides support to the Family Learning and Experience Council and FOX Family Learning Network (FLN). Mindy is inspired by helping people learn, grow, and discover the way that they will make personal and productive contributions by using their strengths and talents.

Mindy has held various roles in small and large family offices and has been responsible for creating and stewarding professional learning networks in support of human and intellectual capital. She has designed learning experiences that increase the knowledge base and enhance the life path of individuals while providing personalized support and coaching to help them meet their goals. As a Certified Meeting Professional with a certificate in Family Business Advising, she enjoys helping families and rising generation members navigate the unique world of enterprise family and family relationships by understanding that responsibility and intention pave a path to personal achievement and satisfaction.

Ruth Easterling
Managing Director, Member Services

Ruth Easterling is Managing Director of Member Services for Family Office Exchange (FOX). In her role, she works with family and advisor members to understand their objectives and provides guidance to help address their unique needs through the resources available at FOX. Ruth also moderates the Private Trust Company Network and works with the team at FOX to develop programming and insights for the Network. Ruth has held multiple roles at FOX including leading FOX member services, supervising the delivery of learning programs, and overseeing marketing to drive the redesign and brand initiatives that differentiate FOX today.

Prior to joining FOX, Ruth worked with the professional services firm Smith, Bucklin & Associates, which provides 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, re-engineering membership structures and planning processes to better enable organizations to maximize their potential through efficient governance structures and member participation. In addition, Ruth often consulted with international and national organizations on strategic planning and governance design.

Ruth holds a B.A. degree in Management and Leadership from Judson College.

Gaby Griffin
Market Leader, Business Owners and Family Office Executives

Gaby Griffin is the Market Leader for Business Owners and Family Office Executives at FOX. In her role, Gaby leads the overall Family Office Council experience and manages multiple councils. She provides members the opportunities to learn from and share ideas with highly accomplished and hard-to-find peers in a confidential environment. No matter what hat she's wearing, her goal is simple – to create value for families by providing objective guidance and timely relevant information in order to make informed decisions. Gaby takes a very personalized approach to her relationship management practice and has built client and advisory relationships that span over two decades. She also serves as a member of the FOX leadership team.Gaby brings 25 years of wealth management, corporate banking, investment, and strategic advisory experience to FOX and its members. Gaby recently joined FOX from Capital Group. Prior to that, she held leadership positions at LaSalle Bank NA advising business owners, their families and family offices, as well as working directly with ultra-high net worth clients as a relationship manager for Abbot Downing. Gaby has been involved with the FOX community for over 20 years.

Gaby earned a B.A. in Political Science from the University of Wisconsin at Madison. She obtained a Certified Private Wealth Advisor (CPWA®) designation at the University of Chicago Booth School of Business in 2013. Ms. Griffin is a member of the Chicago Estate Planning Council (CEPC), Women Investment Professionals, 100 Women in Finance, DyMynd Angels, and Urban Land Institute (ULI). Gaby served on the Board of Trustees for Victory Gardens Theater from 2012-2020. Additionally, she has held several other positions in the non-profit sector.

Glen W. Johnson
Chief Operating Officer

Glen Johnson is Chief Operating Officer at Family Office Exchange (FOX). In this role, he is responsible for all aspects of the member experience, ensuring that each family member, family office executive, and trusted advisor has an unsurpassed experience partnering with FOX by providing unique industry knowledge and insights coupled with a safe and confidential environment where members can share best practices. In addition, Glen oversees the operations of FOX and is charged with establishing and executing systems to execute FOX's strategic plan, promoting it's vision and service-centric culture, and enabling the FOX team to work together to exceed our member's expectations.

Glen has over 30 years of experience working with family offices, business owners, and executives, first as an attorney and then as a wealth advisor, eventually founding Mirador Family Wealth Advisors – the multi-family office for Fifth Third Bank. He has worked with business owners and executives across all stages of their business life cycle including business succession. Glen writes and speaks nationally focusing on family and business governance and the unique challenges faced during the sale and transition of closely held businesses.

Glen earned a Bachelor of Sciences degree in Education from the University of Michigan in Ann Arbor, MI and a Juris Doctorate degree from Wayne State University Law School in Detroit, MI.

Kent Lawson
Director, Technology Integration Services

Kent Lawson is a key resource for FOX and leads endeavors focused on technology among other important deliverables to clients of FOX. Kent has spent over 25 years serving the wealth management community in a variety of roles. He has run his own organizations providing strategic leadership as a trusted advisor and has more than a decade of technology vendor experience, and over 10 years at the executive level within a single-family office.

Peter Leo
Director, Human Capital

Peter Leo, SHRM-CP, is the Director of Human Capital at Family Office Exchange (FOX). He is an accomplished Human Resources Leader with decades of experience leading human resources teams with a specialty in talent acquisition, benefits, employee engagement & relations and HR technology. He has a proven success record working within the financial services, technology, financial technology, manufacturing, and services industries.

Karen Rush
Managing Director, Membership

Karen Rush is Managing Director of the Family Office and Wealth Advisor Markets for Family Office Exchange (FOX). She works with family and advisor members to understand their objectives, providing guidance to help address their needs through the resources available at FOX. She also co-chairs FOX Advisor Councils and assists in the development of new and enhanced service offerings for members. Formerly the events manager, she was responsible for planning all external FOX events, including forums, workshops, and regional events.

Prior to joining FOX in 2005, Karen 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 an education program for the younger generation.

Karen received a B.A. in political science from Southern Illinois University.

Stephanie Simmons
Relationship Manager

Stephanie Simmons is a Relationship Manager at Family Office Exchange (FOX). She brings to her role a background in family office operations, having served in a both a dedicated office and virtual family offices. As a senior relationship manager, Stephanie works with financial families to understand their objectives and provides guidance to help address their unique needs through the resources available at FOX.
Before joining FOX, Stephanie worked with family clients at Personal Office Management, a firm focused on providing financial and project management assistance to high net worth families. She also has a background in private equity investing on behalf of institutions and families, including six years with the family office of former U.S. Secretary of the Treasury, William Simon. Earlier in her career, Stephanie worked in corporate finance/mergers and acquisitions for two leading investment banks. In addition to Chicago, Stephanie has lived and worked in New York, London, and Vero Beach.

Stephanie earned a B.A. in political science from Wheaton College in Norton, MA.

Bill Sullivan
President

Bill Sullivan is the president of Family Office Exchange (FOX). He is a thought leader who understands the role that disruption and innovation will play in transforming our industry. He leads FOX in helping members to understand and plan for future transitions in the family enterprise, the family business, and the family office.

Prior to joining FOX, Bill served for 10 years as the Global Head of Financial Services Market Intelligence at Capgemini. He is a distinguished financial services executive consultant and trusted expert in his field with over 20 years of experience in many globally diverse roles including two years in Paris, France and three years in Hyderabad, India. Bill brings exceptional leadership skills with nearly two decades of leading multi-cultural teams in the U.S., Europe, & Asia-Pacific, as well as in his entrepreneurial background having successfully run his own start–up for three years.

He is a member of the Advisory Board of Ascent Private Capital Management (part of U.S. Bank), currently serves on the Zeta Beta Tau International Supreme Council, is an annual judge for the PWM/The Banker Global Private Banking Awards, and is a multiple recipient of Irish America Magazines Top 100 Business Leaders list.

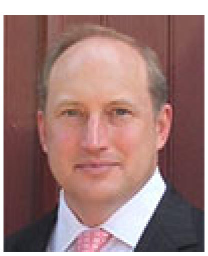
Bill received a B.S. from Tufts University as a double major in Economics and Psychology.

David Toth
Managing Director

David Toth is a Managing Director at Family Office Exchange (FOX). In his role, he constructs actionable insights and strategic analyses for family offices and wealth management advisor members. He developed 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. David has authored several reports including the recently published study on the Transformation of the Ultra-Wealth Business. David serves as co-moderator of FOX's Multi-Family Office (MFO) Council, Integrated Wealth Advisor (IWAC) Councils, and the Strategic CIO Council (SCIOC).

David brings over 30 years of wealth and investment management, marketing, and strategic consulting experience to the FOX team. He 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-high net worth businesses.

David 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, David has completed Leadership and Executive Development programs at the University of Pennsylvania's Wharton School.



Jonathan Tunner
Director, Private Investment Opportunities

Jonathan Tunner is the Director of Private Investment Opportunities at Family Office Exchange (FOX). Jonathan serves as a relationship manager and thought leader helping to develop and execute strategies designed to meet the needs of families across all markets active in direct investing. In his role, Jonathan builds and supports the strategic network of families who desire to share their industry expertise and to collaborate with others to acquire interests in companies and/or real estate. In addition, he oversees the Direct Investing Network (DIN), is a member of the FOX leadership team, and is the Co-Chair of the Owner/Operator Council.

Jonathan brings over twenty-five years of broad business, direct investment, and family office experience to FOX and its members. Jonathan started his career in the international coal industry working in the U.S., Latin America, and Europe for Massey Energy. Jonathan transitioned to oversee daily management of a complex, inter-generational family office. As CFO, Jonathan had senior financial, wealth, and management responsibilities with particular emphasis on sourcing, structuring, funding, overseeing, and exiting privately held businesses and real estate interests across a spectrum of sizes and industries. Jonathan also held extensive operational and executive duties within portfolio companies including CEO, CFO and COO, while also serving on numerous boards. Most recently, Jonathan was CEO of Constellation Partners; a business performance consultancy providing strategy, leadership, and business intelligence related services to drive enterprise value in lower and middle market businesses.

Jonathan earned a B.A. from Hampden-Sydney College majoring in Spanish and minoring in Economics and History, and an M.B.A. majoring in Finance from the University of Richmond.

Scott Winget
Market Leader, Enterprise Families

Scott Winget is the Market Leader for Enterprise Families at Family Office Exchange (FOX). In his role, Scott serves as Co-Chair for Enterprise Councils and Executive Councils, where members can share experiences, ideas and best practices with veteran peers in a confidential environment. Scott also serves as relationship manager for Enterprise Family members, in order to understand their unique needs and provide them with access to important research and objective guidance. He is as a member of the FOX leadership team, helping to develop and execute service strategies designed to meet the needs of his market segment, and also participates in new research and thought leadership meaningful to members.

Serving families for over 25 years in the areas or family office, wealth management and estate and tax planning, Scott brings significant experience to FOX and its members. Prior to joining FOX, Scott created and led multi-disciplinary and award-winning consulting groups that provided comprehensive family office services at both Cresset and Ascent Private Capital Management. Earlier, he was a senior wealth planner at Wells Fargo Family Wealth (later, Abbot Downing) and began his career as an income tax and estate planning specialist with Arthur Andersen and EY. Scott has participated in the FOX community for over 15 years.

Scott is a CPA and holds a J.D. from The Ohio State University, where he also earned a B.S. in Business Administration with a dual major in Accounting and Finance. He is a member of the Rocky Mountain Estate Planning Council, Colorado Society of CPAs and the Colorado Bar Association. He has also held several securities and insurance licenses and served on the board of the Mountain Area Land Trust as Treasurer and head of the Finance Committee among other roles with non-profits.