Peter Boumgarden
Professor of Practice Strategy and Organizations
Olin Business School at Washington University, St. Louis

Peter Boumgarden is the Professor of Practice Strategy and Organizations, Olin Business School at Washington University, St. Louis. Outside of the university, Dr. Boumgarden researches, consults, and facilitates executive education in the private and non-profit sectors on topics tied to innovation, strategic design, organizational change, and executive team development. Dr. Boumgarden' s work centers on helping organizations develop processes for innovation, assisting leaders in defining and implementing sustainably differentiating strategies, and the role of leadership and organizational values in shaping such decisions.

The National Science Foundation selected Dr. Boumgarden as an entrepreneurial mentor in its I-Corp program, a model for bringing high-impact technology from university to market. Continuing his work in the entrepreneurial space, Dr. Boumgarden acts as an advisor to both an early-stage healthcare finance company and a mining/trade finance company based out of Johannesburg, South Africa. He is currently engaged in a project on analyzing early stage investment strategies in the venture capital industry and assessing the historical design of the modern business school and its implications for the transfer of social science technologies to market.

His academic work appears in *Organization Science, Strategic Management Journal, Personnel Psychology*, and *Judgement & Decision Making*. His practitioner work appears in the online arms of *Harvard Business Review* and *Stanford Social Innovation Review*, amongst others.

Diana Ermini
Director of Financial Services Vertical
Sage Intacct

Diana Ermini has more than 20 years of experience in financial services, technology, and marketing. At Sage Intacct, she uses a unique mix of strategic, marketing, operations, and analytical expertise, to maximize business outcomes specifically for financial services firms. Prior to Sage Intacct, she led the marketing strategy and execution to drive the market adoption of CRM solutions to global financial services organizations at Pegasystems (Pega). Prior to Pega, she served as the architect of the overall customer journey to drive adoption of the analytics portfolio for IBM, a suite of financial services products that sustained $60MM in annual sales. Diana is passionate about helping financial firms achieve optimal business outcomes with the help of best-in-class technology.

Outside of the office during COVID-19 times, you'll find Diana spending loads of quality time with family, finding new nature trails to explore, and planning her next big ski trip adventure. She is fluent in Italian and is always looking to pit her language skills in action over virtual coffee or drinks. Diana is currently trying her hand at podcasting to keep things interesting. Connect with her via LinkedIn for networking, the latest technologies impacting finance leaders, and more.

Paul Freeland
Head of Sales and Service
SEI Family Office Services

Paul Freeland is the Head of Sales and Service for SEI Family Office Services. His areas of expertise include: technology and service solutions for high-net-worth families and individuals; outsourced accounting administration service management; and business development best practices

Paul is responsible for all new business development within SEI's Family Office Services division. His team is responsible for identifying new opportunities in the marketplace and presenting value-add technology and outsourced service solutions to family offices, private banks, private wealth advisors and alternative asset managers.

In a previous capacity, Paul served as President of SEI AFO where he oversaw fund administration operations for the firm's emerging managers segment. Additionally, Paul was a founding executive of Archway Technology Partners, acquired by SEI in 2017, where he was responsible for the outsourcing and back-office administration services for family offices, multi-family offices, hedge funds and private equity funds.

Paul is a graduate of Indiana State University and received his M.B.A. from Indiana University. Paul also holds a CPA designation.

Erin Hulse
Founder
Deviate Consulting, LLC

Erin Hulse is the Founder of Deviate Consulting, LLC, which focuses on accounting, software consulting and selection for family offices, investment advisors, hedge funds, fund administrators and small businesses throughout the world. Software focus includes multiple investment accounting, portfolio accounting and wealth management suites prominent in the industry.

Erin began her career practicing tax accounting for Plante Moran in Chicago, IL. She spent five years at Bank of America in Chicago as a Senior Financial Analyst in the Global Principal Investing group. This included working with BAML Capital Access Funds Management, LLC, a private equity fund of funds manager and advisor focused on meeting the targeted mandates of large public pension funds, endowments and other institutional investors. Erin spent time with the Indiana Public Employees' Retirement Fund, which administered and managed seven retirement plans as well as three non-retirement funds, focusing on achieving retirement security through operational and investment excellence.

In 2010, she joined Archway Technology Partners, LLC as a Manager of Professional Services where she focused on software implementations for some of the largest family offices in the country. While at Archway, she also held the position of Manager of Operations of Proteus, LLC, an investment advisory firm that operates an investment platform tailored to the unique needs of high net worth investors and private investment managers. In this role, Erin led the startup of the operations of the fund, including investor and manager onboarding, due diligence, software testing and verification, and client relations. She also became the Business Development Manager of Archway Finance and Operations, a privately held fund administration firm.

Erin has been managing Deviate Consulting since August 2015, and is based in Indianapolis, IN. She earned Bachelor of Science degrees in Accounting and Finance from the Kelley School of Business at Indiana University in Bloomington, IN.

Ryan Kerry
CEO
KnowLedger

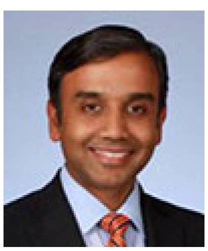
Ryan Kerry is the CEO of KnowLedger. Ryan began his career in the investment technology space in the late 1990’s with Advent software after an introduction to the industry as a bond trader at Mellon Bank. He joined Advent and progressed through roles of increasing breadth and complexity beginning in consulting, and advancing to consulting manager, customer engineering, data conversion, and Advent University. With that experience and his client-focused acumen, Ryan was promoted to the role of overseeing the services side of Advent's lead application, APX (then called Axys 4.0).

Ryan then joined a large Advent client, SEI, in a leadership role managing their Advent outsourcing solution segment which processed data for over 40 banks hosting and running Advent solutions for some of the largest banks in the industry. With this experience managing complex data and client service teams, Ryan chose to leave servicing larger organizations and start his own business, Accusource, which focused on the client space he had become partial to, family offices and registered investment advisors (RIAs).

The vision of Accusource was to provide white glove, high touch, outsourcing options for clients using Advent products. Its reputation as a unique outsourcing option for bespoke needs attracted many family offices and complex RIA’s. Accusource was sold to another outsourcing specialist in Feb 2020.

KnowLedger was spun off as a separate entity as Accusource was being sold. It was developed and launched as an application inside of Accusource to streamline and translate custodial and other investment data into journal entries to post into clients' accounting systems.

Ryan lives north of Philadelphia with his wife and two teenage daughters, and when he’s not running around with his daughters, he can be found following his other passion, bicycling.



Padman Perumal
Chief Executive Officer
Masttro Americas

Padman Perumal is the Chief Executive Officer of Masttro Americas. In this role, he oversees all aspects of the business in the Americas region while reporting directly to Masttro’s Founders.

Padman is a seasoned business executive in the financial services and technology industry with an extensive track record of providing strategic vision, hands-on leadership, entrepreneurship and technical fluency to a wide range of businesses from startups to global financial services institutions. Padman is a real change agent with tireless passion for people and building teams with strong culture and purpose that consistently outperforms by delivering for all stakeholders including clients, employees and shareholders.

Most recently, Padman was Managing Director and Transformation Executive for the Commercial Bank division of JP Morgan Chase where he was member of the Commercial Bank’s Operating Committee responsible for building the division’s transformation function. Padman conceptualized and delivered on a wide range of transformational initiatives including re-imagining the client onboarding model for institutional clients through simplification of coverage model, products, pricing and client service functions.

Prior to joining JPMC, Padman served as Chief of Staff, Head of Strategy and Head of Platform Develop ment for the Private Banking Americas business at Credit Suisse. In this role, Padman was responsible for the operating infrastructure and capabilities of Private Banking Americas and the enhancement of its client and advisor experience. He co-led the strategic redesign of the business with its CEO that generated the highest revenue growth in bank globally, while improving the user experience and reducing costs. Before joining Credit Suisse, Padman held various leadership positions.

Ruchir Swarup
Chief Technology Officer
Addepar

Ruchir Swarup is the Chief Technology Officer at Addepar. He joined from BlackRock, the world's largest asset manager, after serving for 19 years as Managing Director responsible for strategy, design and development of Post Trade capabilities of the firm's flagship Aladdin platform. He was also a member of BlackRock's Global Operating Committee.

At Addepar, Ruchir oversees the company's Data, Platform, and Product engineering teams. He is responsible for accelerating research and development across the platform, and spearheads the development of future products.

He spent the first 15 years of his career in Japan, serving in several technology leadership roles at IBM, Dell, Merrill Lynch, and BlackRock across the Asia-Pacific region.

Ruchir leads with his beliefs in building innovative financial technologies that support the fiduciary duty of advisors and democratizing access to sophisticated wealth management tools to further the industry as a whole.

He earned his Bachelor's degree in Computer Engineering from the Pune Institute of Computer Technology.

Mary E. Timmons
Chief Operating Officer
Northern Trust, Global Family and Private Investment Offices Group

Mary Timmons currently serves as the Practice COO for Northern Trust's Global Family and Private Investment Offices group (GFO). In her current role, Mary and her Team manage and oversee GFO's operations and technology requirements and strategy including the innovation of new products and solutions for the business to ensure the delivery of institutional quality financial information, asset record keeping, integrated reporting and transactional support solutions allowing Clients to manage their global interests more efficiently and confidently. Additionally, Mary is leading and institutionalizing the group's Business Process Review solutions for existing GFO clients and new prospects. Prior to her current role, Mary was Head of Asset Servicing for GFO. In that function, she managed the Client Service Support Team, New Business Consultants and Business Analysts as well as oversaw the Asset Servicing Product for GFO.

Mary started with Northern Trust in the Daily Valuation Group. In April 2006, she moved to Dublin to manage a Program to implement a Pan European platform that would support the current and anticipated growth of the Global Fund Services ("GFS") business across Europe. As part of the Project, she relocated to London in September 2007 where she was responsible for the EMEA Transfer Agency Consulting Group within GFS.

Prior to joining Northern Trust as a Vice President in January 2001, Mary served as Director of Operations for ADP in Deerfield, Illinois for three years. Previously, she was a Manager at Bank One in Columbus, Ohio for six years and worked in the Internal Audit Departments at Continental Bank and Connecticut National Bank.

Mary received a B.S. degree in Finance from Indiana University and is a Board Member of Chicago Commons

Mindy Kalinowski Earley, CMP, CFBA
Chief Learning Officer, FOX Family Learning Center™
Family Office Exchange

Mindy Kalinowski 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.

Tony Gebely
Chief Technology and Integration officer
Family Office Exchange

Tony Gebely is Chief Technology and Integration Officer for Family Office Exchange (FOX). In his role, he is responsible for the firm's technology architecture. Tony also manages the FOX Technology Operations and Data Security (TODS) Network. Tony is also responsible for FOX's cybersecurity initiatives and is constantly working towards ensuring that FOX's systems meet the highest standards in data security. He managed the design and operation of the firm's Drupal based membership website, our marketing automation system, our Office365 instance, our Dynamics CRM instance, and the integration between all of them. He also oversees the accounting and communication systems at FOX.

Tony has 13 years of experience in technology and marketing. Outside of FOX, he is a leading expert on tea, has traveled extensively throughout Asia studying its cultivation, and authored the book, *Tea: A User's Guide.*

Tony received a B.S. in Computer Science from Rowan University in New Jersey.

Glen W. Johnson
Chief Operating Officer
Family Office Exchange

Glen W. 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
FOX Technology Advisor
Family Office Exchange

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.

Bill Sullivan
President
Family Office Exchange

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.

For the past 10 years, Bill has served 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
Family Office Exchange

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
Family Office Exchange

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 US, 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
Family Office Exchange

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.