Thomas J. Anderson
Author, *Money without Boundaries*

Thomas J. Anderson is a New York Times best-selling author of four books including the recently released *Money Without Boundaries – How Blockchain Will Facilitate the Denationalization of Money.*

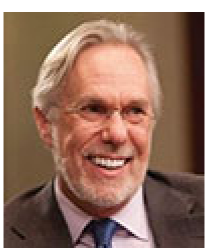
Thomas is the Founder and Chairman of two financial technology platforms. Supernova Technology is a digital lending platform focused on secured loans. Supernova provides critical infrastructure to large banks and insurance companies. Thomas recently founded Anasova. Anasova is an early-stage company leveraging blockchain technology to organize and optimize individuals' lives.

Prior to working in technology, Thomas worked in investment banking and wealth management for Wells Fargo, Deutsche Bank, Merrill Lynch, and Morgan Stanley where he served as Executive Director, Morgan Stanley Wealth Management. *On Wall Street Magazine* recognized Tom as a "40 under 40". *Barron's Magazine* recognized him multiple times as one of America's Top 1,200 advisors: State by State.

Thomas has been interviewed in news media outlets around the world including the *New York Times, USA Today, Forbes, CNBC, Fox, Bloomberg,* and the *Washington Post.* He is a regular speaker at events throughout the financial services industry. Thomas has his M.B.A. from the University of Chicago and a B.S.B.A. from Washington University in St. Louis.

Catherine Berman
CEO, CNote

Catherine Berman is the CEO and Co-founder of CNote, an impact investment platform delivering competitive returns by investing in women, minorities, and low-income communities across America. She's a three-time entrepreneur with experience building scalable businesses. Her last startup grew into a multi-million-dollar firm in less than four years. Prior to CNote, she worked as a Managing Director at Charles Schwab focused on new market segments and predictive analytics. At the vanguard of impact investing, Catherine has spoken at events hosted by Stanford, Oxford, Google, The Economist, SoCap, Coinbase, and others to challenge conventional thinking about money and meaning.



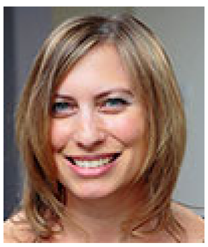
Jeff Brown
Managing Partner, Political Economy, LLC, Board Chair, CFM Partners, Inc.

Jeff Brown is the Managing Partner of Political Economy, LLC. He has spent his career at the nexus of politics, the economy, and finance. Today, he enjoys advising companies, family offices, deserving nonprofits and policymakers. He spent much of his career in the investment management industry as an economist, portfolio manager and investment strategist. Prior to becoming a partner at the Capital Group, he advised government officials at the state and federal levels, including the Central Intelligence Agency. He also serves as Chairman of CFM Partners, Inc. a governance, risk, and compliance company based in Washington, D.C. Jeff's personal philanthropy is focused on educational opportunities for underrepresented populations across the globe.

Andrew Eberhart
Managing Partner, Wingspan Capital

Andrew Eberhart is the Managing Partner of Wingspan Capital. Previously he was Chief Investment Officer for the Heinz Family Office (2012-2018). While with Heinz, he originated and implemented the portfolio's niche investment program. Earlier in his career Andrew was an Investment Consultant at Cambridge Associates where he advised major families, endowments, and foundations. During his career, he also held Managing Director positions at Lazard, Citibank, and U.S. Trust. He is a frequent speaker at industry conferences and was named as a "Top 30 Family Office CIO".

Prior to his investment career, Andrew was a U.S. Navy carrier pilot, and later founded a DOD supported private equity fund to promote economic development in Iraq. He holds a B.A. from Cornell and an M.B.A. from Wharton.



Constance Freedman
Founder and Managing Partner, Moderne Ventures

Constance Freedman is the Founder and Managing Partner of Moderne Ventures and the Moderne Passport, an early stage investment fund and industry immersion program which is focused on investing in technology companies in and around the multi-trillion dollar industries of real estate, mortgage, finance, insurance and home services. Constance has invested in more than 70 companies and actively partners with 700+ industry executives and corporations to help build strategic value and scale. She is active on several company boards, past and present, including DocuSign [NASDAQ: DOCU], Updater [ASX:UPD], Homesnap, UrbanBound and TaskEasy and Equity Lifestyles [NYSE:ELS].

Prior to launching Moderne Ventures, Constance was the head of Strategic Investments at the National Association of Realtors where she launched and managed its venture fund, Second Century Ventures (SCV) in 2008, and founded its accelerator program, REach, in 2013. Prior to joining SCV, Constance was an investor with Cue Ball, an early and growth stage investment fund focused on the information services and consumer sectors. Constance began her career spending 7 years in an operating capacity at technology start-ups Molecular (backed by CMGI, acquired by Isobar) and Account4.com (acquired by Lawson). Constance was a practicing real estate agent for three years prior to starting her career in technology and investing.

Constance has been the recipient of several prestigious awards including HousingWire's Women of Influence, *Crain's Business* 40 under 40, and has appeared multiple times on Crain's Chicago Top Tech 50, Swanopoel's Power 200 and Inman's Top 101 in Real Estate. Constance is frequently an invited speaker at nationally renowned venture industry, real estate and fintech conferences.

Constance has served on the Advisory Board for the National Venture Capital Association's Corporate Venturing Group from 2010-2013 and is on the board of overseers for the non-profit, From the Top. She is also an active Mentor for startups at TechStars and other accelerator groups.

Constance earned a B.S. from Boston University and an M.B.A. from Harvard Business School.

Kristin Hull, Ph.D.
Founder and CEO, Nia Impact Capital

Kristin Hull is the Founder and CEO of Nia Impact Capital. Kristin is a conscious investor, empowering individuals, families and organizations to invest in alignment with their values, for the world they want to see. Kristin launched Nia Global Solutions in 2013 to bring activism and impact investing into the public markets. In doing so, she developed Nia's six solutions-focused investment themes, weaving a gender-lens throughout the investment thesis.

Kristin founded Nia Community Investments in 2010, a 100% mission-aligned investment fund focused on social justice and environmental sustainability in Oakland. Prior to Nia Community, Kristin served as President and Chair of the Board of the Hull Family Foundation from 2007 to 2011, where she oversaw all of the investment efforts, transitioning the endowment from a traditional investment portfolio to one of the country's first 100% mission impact invested portfolios. Kristin is also a co-founder of Impact Hub Oakland, a co-working space nurturing entrepreneurs and social change makers.

Prior to dedicating her career to conscious investing, Kristin served as an educator and classroom teacher. In 1997, Kristin co-founded the North Oakland Community Charter School, and served on the founding board of the George Mark Children's House, the first free standing children's hospice and palliative care center in the U.S.

Kristin is devoted to promoting inclusion and diversity in leadership, to re-envisioning capitalism and to changing the face of finance. She serves on the board of directors for the Mosaic Project and Community Action Fund for Women of Africa (CAFWA) and is an advisor to Playworks, the Nicholson Foundation, and ToSomeone.

Kristin earned a Ph.D. in Urban Education from the University of California at Berkeley in 2006, her M.A. in Research in Bilingual Education from Stanford University in 1995, her B.A. and teaching credentials at Tufts University in 1990.

Stephen Martiros
Founder and CEO, Financial Building Blocks

Stephen Martiros is the Founder and CEO of Financial Building Blocks® a cloud-based financial education software platform. Stephen previously served as Managing Partner of CCC Alliance, a Boston-based network of single-family offices, He also was founder and CEO of Summitas, a software company that provides family offices and investment advisors with a secure portal for collaboration.

Stephen received his B.S. and M.B.A. from Babson College, where he serves on the Board of Overseers, is an Entrepreneur-in-Residence developing the Babson Institute of Family Entrepreneurship and is a recipient of the Snyder Award for Distinguished Service.

Scott Saslow
Founder and CEO, ONE WORLD

Scott Saslow is the Founder and CEO of ONE WORLD Training & Investments, a for-profit public benefit corporation based in Palo Alto, CA that provides training and investment capital to social impact companies in The San Francisco Bay Area. Since its founding, ONE WORLD has provided training programs to several thousand professionals including company CEOs, impact investors, and leaders in large enterprises across all industries. ONE WORLD also manages an early stage impact fund, with a portfolio of over 20 companies.

Previously, Scott was the Founder & CEO of The Institute of Executive Development, a consultancy that provided innovative executive leadership development to a global client base including American Express, Boeing, CBS, Cisco, The Gap, Harvard Business School, Intel, Microsoft, Time Warner and The U.S. Navy.

Earlier in his career, Scott worked at Siebel Systems (acquired by Oracle) and Microsoft Corporation in leadership roles.

Scott is a graduate of Harvard Business School (M.B.A) and Northwestern University (B.A.,Economics), and has authored over 25 articles and research reports on *Executive Development*, and has been interviewed by and quoted in *Harvard Business Review, Bloomberg, Directorship*, and *Forbes*.

Rudina Seseri
Founder and Managing Partner, Glasswing Ventures

Rudina Seseri is Founder and Managing Partner of Glasswing Ventures, leading the firm's investments in Artificial Intelligence (AI) enabled enterprise software as a service (SaaS), cloud, Information Technology (IT) software, and vertical markets. Rudina has led investments and held Board of Directors roles at ChaosSearch, CloudTruth, inrupt, Navigant (acquired by Veritas), Plannuh, Talla, Verusen, Zylotech, Celtra, CrowdTwist (acquired by Oracle), and SocialFlow.

Rudina has 17 years of investing and operational experience in high growth companies in IT software, cloud and enterprise SaaS. Previously, Rudina was a Senior Manager in the Corporate Development Group at Microsoft Corporation. In this role, she led a number of successful acquisitions including iView Multimedia, Massive Interactive, Bungie Studios restructuring (creator of the Halo franchise), Deep Metrix, and Lionhead Studios. Prior to Microsoft, she was an investment banker in the Technology Group at Credit Suisse responsible for multibillion-dollar acquisitions and financings.

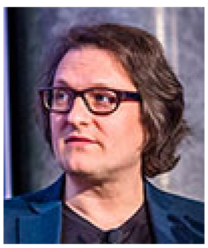
Rudina has been appointed by the Dean of the Harvard Business School (HBS) for four consecutive years to serve as Entrepreneur-In-Residence for the Business School and has most recently been named to the 2018 HBS inaugural group of Rock Venture Capital Partners. She is also a Member of the Business Leadership Council of Wellesley College and an Advisor for GSK Consumer.

Entrepreneur Magazine has named Rudina Seseri on their 2019 100 Powerful Women list. She is a Boston Business Journal Power 50: Newsmaker, a Women to Watch honoree by Mass High Tech and a Boston Business Journal 40-under-40 honoree — recognized for her professional accomplishments and community involvement. Rudina has been published in *TechCrunch, Forbes, Quartz, VentureBeat, GigaOm*, and other leading business publications. She graduated magna cum laude from Wellesley College with a B.A. in Economics and International Relations and holds an M.B.A. from HBS. She is a member of Phi Beta Kappa and Omicron Delta Epsilon honor societies.

Hans Vaule, CFA, CAIA
Managing Director, Cambridge Associates

Hans Vaule has more than 20 years of experience as an investor and has been with Cambridge Associates since 2007. He is a Managing Director at the firm. Hans actively works with a variety of private clients that range in size from $40 million to over $1 billion. Hans has a strong background in private equity, with experience in distressed, traditional buyout, and growth equity investments across a range of industries in the U.S. and Europe.

Prior to joining Cambridge Associates, Hans spent seven years in private equity, working on growth and turnaround investments with Platinum Equity and TPG. Prior to that, Hans was a Business Unit Manager for Schlumberger in Paris and a Management Consultant in Silicon Valley. Before business school, Hans worked in the software industry in the US and Europe. He started his career as an Investment Specialist for Fidelity Investments in Boston.



Robert C. Wolcott
Co-Founder & Chairman, TWIN Global; Adjunct Professor of Innovation, Kellogg School of Management at Northwestern, Booth School of Business, University of Chicago

Robert C. Wolcott is Co-Founder & Chairman of The World Innovation Network (TWIN), a global community of over 2,000 innovation and growth leaders from over 30 countries and across sectors (business, government, the arts, academia, defense). Robert is a Managing Partner with Clareo, a foresight and innovation strategy consultancy, an active angel investor and a Contributor for Forbes regarding the impact of technology on business, society, and humanity.

Adjunct Professor of Innovation at the Kellogg School of Management, Northwestern University, and the Booth School of Business, University of Chicago. Robert won Teacher of the Year from Kellogg's EMBA program in 2013, 2014, 2015 and 2017. He holds a B.A. in European and Chinese History and an M.S. and Ph.D. in Industrial Engineering and Management Science, all from Northwestern University.

Tim Duffy, Esq.
General Counsel and Advisor, Direct Investing Network, Family Office Exchange

Tim Duffy is the General Counsel and Advisor to the Direct Investing Network at FOX. In his role, he is responsible for overseeing FOX's legal affairs and advises the company on a wide range of legal and business issues.

Tim has over fifteen years of professional experience in private equity, venture capital, and a broad range of M&A transaction experience, as both an entrepreneur and an attorney.

Tim attended The Ohio State University, where he graduated magna cum laude with a B.A. in Political Science and was a three-time Big Ten Scholar Athlete. Tim also holds a J.D. from DePaul University College of Law

Charles B. Grace, III
Managing Director, Family Office Exchange

Charles B. Grace, III is a Managing Director at Family Office Exchange (FOX) and based in New York City. He works primarily on Advisory Group projects at FOX for multi-generational families and family offices covering all aspects of wealth management. Assignments have included strategic planning, generational transitions, family office design and assessment, governance, operations and processes, development of investment programs, advisor due diligence, and best practices. Charlie is also active at FOX with family office and wealth advisor members as well as the firm's thought leadership and original research.

Charlie has been active for 20 years in the family office community advising high net worth families and serving as a resource to 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, including *The Wall Street Journal, Financial Times, The New York Times,* and presented at many conferences focused on private investors and family offices.

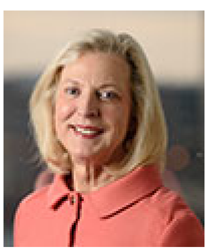
Charlie serves as Treasurer and member of the Executive Committee and Investment Committee of the nonprofit Tuttle Fund, Inc. in New York City. He graduated with a J.D. from the Washington College of Law. Charlie received a B.A. and M.A. in history from Bates College and the American University, respectively.

Gabrielle ("Gaby") Griffin
Market Leader, Business Owners and Family Office Executives, Family Office Exchange

Gaby Griffin is the Market Leader for Business Owners and Family Office Executives at Family Office Exchange (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 N.A. 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. Gaby 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.



Sara Hamilton
Founder & CEO, Family Office Exchange

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 market segment in wealth management.

Sara founded the 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 and managing financial transitions. As a result, FOX evolved into a strategist for family enterprises, a platform for sharing family wealth best practices, and an industry advocate for the importance of private capital in a global economy.

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. She was named one of the Top 50 Women in Wealth Management by Wealth Manager from 2010-2012 and 2019 Outstanding Thought Leader for Wealth Management by Family Wealth Report.

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 Private Directors Association in Chicago and the Foundation for Gender Equality in New York.

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.

Miguel López de Silanes Gómez
Managing Director for International Members, Family Office Exchange

Miguel López de Silanes Gómez is the Managing Director, Market Leader for International Members, Family Office Exchange (FOX). He is responsible for delivering FOX services to current members, and actively works to expand the network in Europe and Latin America.

Miguel has most recently been director of the family office for one of Europe's leading real estate families, with specific responsibility for designing and implementing the family's investment strategy and for providing owner education to the younger family members.

Previously, he worked at UBS Wealth Management in New York, Chile, and other locations in Latin America. He began his career at Bain & Company as an Associate Consultant in London and Madrid. He has an M.B.A. from Harvard Business School and a B.A. in Economics from Universidad Pontificia Comillas (ICADE) in Madrid.

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.