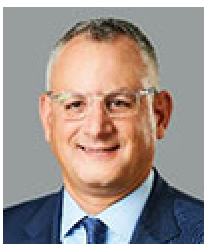
Doug Fritz
CEO and Founder, F2 Strategy

Doug Fritz is CEO and Founder of F2 Strategy, a leading technology consulting firm to the wealth management industry. Prior to founding F2 Strategy, Doug was Chief Technology Officer for First Republic Private Wealth Management where he led the execution of the Wealth Tech Roadmap and introduced transformative technology to an amazing, client-focused firm. The new tools he rolled out for their portfolio managers enabled FRB to continue its stellar reputation well into the 21st century.

Prior to joining First Republic, Doug was senior vice president at Wells Fargo Wealth Management where he ran strategy, implementation and support for the Portfolio Management Desktop including portfolio analytics, advisor dashboard, compliance and proposal generation. Doug was poised for success after years as a management consultant for KPMG Consulting.

Doug is frequently quoted in the media and a sought-after public speaker. He earned a B.A. in Russian and International Business from Southern Illinois University and started his career at Credit Suisse in Moscow.



Thomas P. Melcher
Managing Director, Director of Family Wealth, Glenmede

Thomas Melcher is the Managing Director, Director of Family Wealth. In this role, Thomas leads Glenmede's wealth management practice for entrepreneurial clients and multi-generational ultra-high-net-worth families, including the development and management of customized and comprehensive planning, advisory and investment management services. Thomas is a member of Glenmede's Private Wealth leadership team, a voting member of the Investment Policy Committee and a member of the Private Wealth Operating Committee. In addition, Thomas serves as a primary point of contact for Glenmede's strategic alliance with Stonehage Fleming.

Prior to joining Glenmede, Thomas devoted two and a half decades to PNC, where he most recently served as EVP and Chief Investment Officer (CIO), for the PNC Asset Management Group. Prior to that, he was the Managing Executive for Hawthorn, PNC Family Wealth, where he built the practice into one of the nation's largest providers serving ultra-high-net-worth clients. Previously, Thomas held the CIO role for PNC Wealth Management in Philadelphia and Southern New Jersey. Mr. Melcher's media presence includes appearances on CNBC, citations in the *Financial Press* and extensive quotations in *"The Family Office Book,"* written by Richard Wilson. Thomas also authored the foreword to *"Sell Like A Team"* by Michael Dalis and was twice recognized as one of the nation's "Top 100 Wealth Advisors" by *Worth Magazine*.

Thomas earned a Bachelor of Science degree from Miami University in Oxford, Ohio and has pursued graduate work at Drexel University in investment management.

Milton Pedraza
Chief Executive Officer
Luxury Institute, LLC

Milton Pedraza is the CEO of the Luxury Institute and a private investor. Today, Luxury Institute is the world's most trusted research, training, and elite business solutions partner for luxury and premium goods and services brands. With the largest global network of luxury executives and experts, Luxury Institute has the ability to provide its clients with high-performance, leading-edge business solutions developed by the best, most successful minds in the industry.

Over the last 17 years, Luxury Institute has served over 1,100 luxury and premium goods and services brands. Luxury Institute has conducted more quantitative and qualitative research with affluent, wealthy and uber-wealthy consumers than any other entity. This knowledge has led to the development of its scientifically proven high-performance, neuroscience and emotional intelligence-based education system, Luxcelerate, that dramatically improves brand culture and sales performance.

Milton advises and coaches luxury CEOs and advises and serves on the boards of top-tier luxury and premium brands, as well as luxury and premium startups. He is a member of the Advisory Board at the Ultra High Net Worth Institute. He is a recognized investor and authority on the Personal Data Economy, Privacy and Personalization, Customer Relationship Management and Artificial Intelligence technologies. Prior to founding the Luxury Institute, his successful career at Fortune 100 companies included executive roles at Altria, PepsiCo, Colgate, Citigroup and Wyndham Worldwide.

Nicholas Petrie
Author, *Work Without Stress: Building a Resilient Mindset for Long Term Success*

Nicholas Petrie helps organizations prepare their leaders for a complex world. His clients include: Google, Walmart, Home Depot, Salesforce, NASA, Airbnb, Delta and Comcast. He has worked globally across industries including; engineering, tech, banking, education, energy, law and television. His specialty areas are: leading in complexity (vertical development), C.E.O. led leadership development and resilience under pressure.

Nicholas holds a master's degree from Harvard University and is the author of the book, "*Work Without Stress: Building a Resilient Mindset for Long Term Success".*

Amy E. Szostak
Senior Vice President, Director, Family Education and Governance, Northern Trust Company

Working with Northern Trust's wealthiest client base, Amy has gained insights into how families successfully navigate sustainable intergenerational wealth. She works with families to identify their goals, develop a common purpose, create a framework for decision making, execute succession plans, deliver financial literacy curriculum and cultivate a growing appreciation for the impact of wealth beyond the balance sheet. All of this to empower clients to not only successfully manage their wealth today, but to develop the stewardship skills to flourish long into the future. Prior to her current role, Amy served as the Chief Fiduciary Officer for the Global Family and Private Investment Office Group (GFO) where she oversaw the fiduciary client base in the US, Cayman Islands and Bailiwick of Guernsey.

Amy is a Senior Vice President at Northern Trust. She holds a license to practice law in Illinois, is an active member of STEP (Society of Estate and Trust Practitioners), a Certified Trust and Financial Advisor (CTFA), a Certified Investment Management Analysis (CIMA), and obtained her STEP Certification in International Trust Management (2017).

Jack Thurman
Managing Partner, BKD Family Office

Jack Thurman is Managing Partner of BKD Family Office, a wholly owned subsidiary of BKD CPAs & Advisors, a national CPA and advisory firm. BKD Family Office is an advisory practice that provides integrated family office services to ultra-affluent families and family office leadership.

Jack oversees a monthly webinar series, "BKD Family Office Thoughtware," that provides intellectual capital and best practices for family office leadership team members. He has also been quoted in publications such as *Forbes, The Wall Street Journal, Bloomberg Businessweek, SmartMoney* and *CNBC.com*.

Jack obtained his Certified Investment Management Analyst® (CIMA®) designation from The Wharton School, University of Pennsylvania, and has completed the Pepperdine University Graziadio Business School's Financial Management for the Family Office program.

He is a member of the Investments & Wealth Institute™. Jack is a 1983 graduate of Drury University, Springfield, Missouri, with a B.A. degree in business administration.

Jaclyn Webb
Family Learning and Events Manager, Walton Enterprises

Jaclyn Webb spent 12 years working at the Walmart Home Office in various learning and development positions, prior to joining WEI. Some of her responsibilities included the creation, design and execution of the APEX program for International officers, corporate executive development, selective and high potential leadership programs, executive coaching, consultative team building design and facilitation, and leadership training programs for all associates.

Following Walmart, Jaclyn supported Grit Studios events to connect local entrepreneurs with the community, bridging relationships to accelerate the growth and expanse of their businesses.

Jaclyn has also served as a consultant to churches and ministries across the US, helping them to expand their reach and impact through strategic planning, improved processes, and project management. Jaclyn holds a B.S. in Child and Family Services from Oklahoma State University.

John Zimmerman
President, Ascent Private Capital Management of U.S. Bank

As President of Ascent Private Capital Management, John Zimmerman sets the strategic direction and oversees all aspects of Ascent. He has more than 30 years of financial services experience, particularly in serving ultra-high net worth clients. Prior to his appointment as President, John served as Ascent's Regional Managing Director for the Denver region.

John is a Chartered Financial Analyst and holds a bachelors degree from the University of Missouri and a master's degree from Saint Louis University. Community involvement is a passion; he serves on the boards of Boy Scouts of America — Denver Area Council, Seeds of Hope Charitable Trust, the Catholic Foundation of Northern Colorado and the University of Missouri Trulaske School of Business strategic development board.

Glen W. Johnson
Chief Operating Officer, Family Office Exchange

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.

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

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.

Karen Rush
Managing Director, Membership, Family Office Exchange

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.

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.

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.