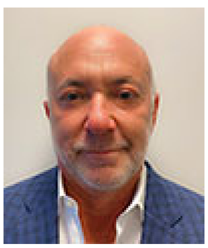
Ben Buettell
Director, Fusion Acquisition Corp, and Co-Founder/Former Partner of R7 Partners

Ben Buettell is Director, Fusion Acquisition Corp., and Co-Founder/ Former Partner of R7 Partners, an early-stage technology venture firm, located in Chicago. Previously, he spent 24 years at Houlihan Lokey where he served as a strategic and financial advisor to public and private companies.

Ben is also the President of the Gamma Beta Foundation which provides financial aid, scholarships and educational opportunities to collegiate members of Gamma Beta Chapter (Northwestern). He also serves as Vice President and Treasurer of the Sigma Nu Alumni Association of Evanston (SNAA) which provides oversight of the Gamma Beta Chapter's operations.

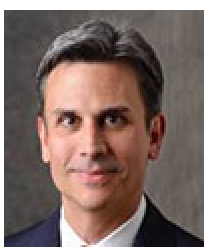
Ben has been actively involved with SNAA since his graduation in 1984. While a collegiate member he served as Lt. Commander and Commander. During 2014, he was the main liaison with Northwestern University regarding the renovation of the chapter house as part of the recolonization effort.



Barry Dorfman
Founder and President, BLD Holdings, Inc.

Barry Dorfman is Founder & President, BLD Holdings, Inc. Barry is an SFO in Palm Beach, FL and NYC, and a physician with an extensive background in healthcare. He experienced his first liquidity event during the 90s when he sold his medical rehabilitation business.

Barry sits on the board of other family offices and has a network of institutional investors and family offices that invest in real estate, VC/PE, and hedge fund managers. BLD Holdings participates as a co-investor and coordinates access to this broader syndicate.



Phil Durst
Chief Investment Officer, Brush Street LLC

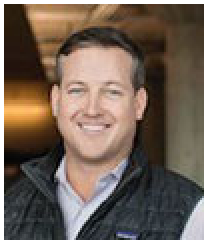
Philip Durst serves as Chief Investment Officer and Chairman of the Investment Committee for Brush Street Investments, LLC, the investment arm of Ford Estates, LLC. His responsibilities include comprehensive oversight and execution of the company's strategic investment platform and overall portfolio management across all asset classes. Additionally, he works closely with the CEO and other Senior Advisors at Ford Estates to deliver comprehensive investment advice across multiple generations of the Ford family.

Philip has over 25 years of diverse investment management experience across the public/private equity, fixed income, credit, real estate and alternative investment markets. Most recently, Philip was a senior member of Tolleson Wealth Management's leadership team, where he served as Chief Investment Officer and Chairman of the firm's Investment Committee. Additionally, he was a member of the firm's Executive Committee, which oversaw the strategic and operational matters of the entire company.

Prior to joining Tolleson, Philip worked within the investment management divisions of both INVESCO and John McStay Investment Counsel in Dallas. In these roles, he was directly responsible for identifying investment opportunities in support of their fundamental approach to managing capital in both core and income-oriented portfolios. In addition, Philip has experience identifying and executing paired equity investments, with a focus on publicly traded energy technology companies; along with experience evaluating mid- to late-stage venture capital investments in private energy technology arena. Early in his career, Philip spent several years with Crescent Real Estate in Fort Worth, Texas as a part of their Asset Management team, and with Ernst & Young in Dallas, Texas as a Senior Auditor within the company's Entrepreneurial Services division. *(biography continues on the next page)*

• Biographies continue on next page •

Philip earned a Master of Business Administration with concentrations in investment finance and real estate finance from Southern Methodist University, receiving the honors graduate distinction of Beta Gamma Sigma. He received his undergraduate degree in accounting from the University of North Texas. He is a Certified Public Accountant (CPA) and is a Chartered Financial Analyst (CFA) charterholder.



Andy Gloor
Chief Executive Officer, Sterling Bay

Andy Gloor is Chief Executive Officer at Sterling Bay. In 2002, Andy joined Sterling Bay and directed its growth and evolution into a 200-plus-person fully-integrated, owner/operator real estate investment and development company. Andy led Sterling Bay to become a pioneer of the urban model of innovation districts in Chicago and anchor its developments with leading corporations. Recent high-profile development and re-development projects completed by Sterling Bay under Andy's leadership include corporate headquarters for McDonald's, Google, Hillshire Brands, C.H. Robinson, Dyson, Glassdoor and Gogo. Prior to leading Sterling Bay, Andy was a Managing Director at Insignia/ESG, where he completed over five million square feet of commercial real estate transactions.

Andy began his career as a tenant-side commercial real estate broker. Andy earned a B.A. in Political Science from Miami University in Oxford, Ohio. Andy is actively involved with Misericordia, a Chicago organization supporting persons with developmental disabilities. He also serves on the board of Cara, a Chicago non-profit helping to break the cycle of homelessness. Andy is a licensed managing real estate broker in Illinois.

Alex Gong, CFA
Fonex Group

Alex Gong started his career in finance as a research analyst with Morgan Stanley Asia 16 years ago. He then served as CFO and senior VP with a number of pre-IPO and U.S. and Hong Kong listed companies headquartered in China. For the past 3 years, Alex was the CEO of JR Group, a member of FOX, and a wealth management firm based in China. Alex helped a number of Chinese UHNWIs with their global asset allocation, family learning and immigration. Alex has also raised and managed two RMB funds and one overseas fund.

Brent Hill
Managing Partner, Origin Ventures

Brent is a Managing Partner at Origin Ventures, an early stage venture capital firm focused on the *Digital Native* economy. He serves on the Board of Directors of 15Five, Fountain, Apptentive, Everee, Voxpopme, Pronto, Measured, Kidizen and Bound. He is a board observer for Cameo, DirectScale, Appdetex, and Viral Gains. Previous investments include BacklotCars (acquired by NYSE: KAR), Teem (acquired by WeWork), Ahalogy (acquired by NYSE: QUOT), Grubhub (NYSE: GRUB), Tubemogul (acquired by NASD: ADBE), and Wire (acquired by Remitly).

Prior to joining Origin Ventures, Brent held leadership roles at Twitter, Google, and IAC. He was a co-founder of MVP.com, an online sporting goods retailer. Brent started his career at Accenture, where he spent 10 years developing CRM software for the telecom industry.

Brent received a B.S. in Finance from Bradley University, where he was captain of the golf team. He received his MBA from the University of Chicago Booth School of Business, where he serves as a judge for the annual New Venture Challenge. *(biography continues on the next page)*

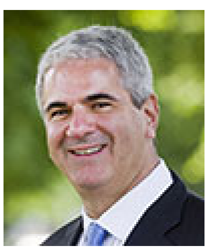
• Biographies continue on next page •

He was recognized in Crain's Chicago Business *Tech 50.* An avid runner and cyclist, Brent has completed 20 marathons - including three of the World Marathon Majors. He was a 2013 Team USA qualifier for the World Duathlon Championships in Spain. As a youth sports coach, over 50 of his former players went on to participate in collegiate athletics.

Kristen Jones
Partner, Private Equity and Private Credit Research Analyst, Albourne Partners

Kristen Jones is a Partner and Private Equity and Private Credit Research Analyst. Kristen covers a wide range of Private Credit strategies with an emphasis on U.S. stressed and distressed credit opportunities. She holds primary responsibility for maintaining coverage on a range of private credit sub-strategies including control, non-control, asset-backed, distressed lending and multi-strategy credit. She also covers US turnaround (i.e. distressed equity) and a number esoteric strategies, such as aviation, drug royalties and litigation finance. In addition to providing intensive onsite due diligence, strategy forecasts, written manager evaluations and investment recommendations.

Kristen directly supports the Albourne Head of Private Markets and Albourne COO as a project manager and function liaison for Private Markets initiatives. Before joining Albourne in 2009, Kristen worked at Waycrosse, Inc. Cargill and MacMillan Family Office (2006-2008) and Lacrosse Global Fund Services in the cash and collateral group (2008). Kristen is based in Minnesota and reports through Albourne's San Francisco office. Kristen holds a B.S.B. in Finance with High Distinction from the University of Minnesota, Twin Cities Curtis L. Carlson School of Management.



Jonathan Krane
Chief Executive Officer, KraneShares

Jonathan Krane is Chief Executive Officer of KraneShares, an asset management firm delivering China-focused exchange traded funds to global investors listed on the NYSE. KraneShares focuses on providing expert access and products for investors to gain exposure to China's capital markets. KraneShares sold a majority interest in the company to CICC, a leading investment bank in China. Jonathan has spent the last fifteen years working with companies in China.

He previously founded a leading media and entertainment company in China which was later sold to a publicly traded multi-national corporation.
Jonathan received an M.B.A. from Columbia Business School and a B.A. from Connecticut College. He is on the board of the US-China Strong Foundation and is a member of the Young Presidents Organization (YPO).

In addition, Jonathan is a founding investor of Trella, an urban forestry and technology company helping Chinese cities, as well as a Founding Partner and Principal Owner of Queensboro FC, the first professional men's soccer team in Queens, New York.

Christopher Merrill
Co-Founder, Chairman, and Chief Executive Officer, Harrison Street

Christopher Merrill is the Co-founder, Chairman and CEO of Harrison Street, a real assets investment management firm he co-founded in 2005 that has completed approximately $40 billion in transactional volume and as of 4Q20 has over $32 billion in AUM. *(biography continues on the next page)*

• Biographies continue on next page •

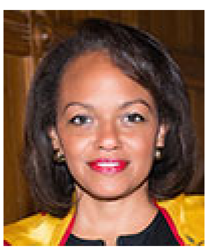
Christopher Merrill is currently the largest individual shareholder and serves as Chairman of the Board and the Investment and Executive Committees of the Company. The firm was a first mover and innovator of a focused investment strategy around the Education, Healthcare and Storage segments of the real estate market (launching eleven closed-end funds as well as industry leading open-end funds).

Over 410 investors ($19 billion) participate in Harrison Street funds including US, European and Asian pension funds, corporate plans, insurance companies, endowments, foundations and family offices. The firm has main offices in Chicago, London and Toronto.

Prior to co-founding Harrison Street, Mr. Merrill was a partner, owner and Managing Director of a large US Pension Fund Advisory firm where he developed the firm's presence in Europe, creating the first ever real estate funds exclusively targeting the markets of Central Europe. This initial fund was one of the Top 10 performing global funds during vintage years 1996-2000 as noted by Preqin.

Christopher has appeared on television and in numerous real estate journals, as well as, speaking engagements regarding real asset investing. In 2019, the firm was voted Alternative Investor of the Year: North America, by its PERE peers. Over the years, *National Real Estate Investor Magazine* has named Christopher one of the "10 To Watch" leaders in the industry, PERE nominated him as one of the top real estate executives in North America, Real Estate Forum named him one of "Chicago's Real Estate Icons" and he was included as one of "Crain's 40 under 40." In 2018, Christopher was one of the finalists in PERE's North American Industry Figure of the Year.

Christopher is a member of YPO, Economic Club of Chicago, and Chicago Commonwealth Club. He serves on the board of PREA, AFIRE, the real estate advisory boards of two Chicago based family offices (Gore Creek and Kinship Capital), The First Tee of Greater Chicago, Salisbury School, and Chicago Botanic Garden (Financial Committee). He is also an active angel investor in many early-stage companies. Mr. Merrill earned his M.B.A. from the CASS School of Business in London, England.



Valerie Mosley
Founder of BrightUP and Chief Executive Officer, Valmo Ventures

Valerie Mosley is the Founder of BrightUP and Chief Executive Officer of Valmo Ventures. Valerie is the Founder of Upward Wealth, a fintech platform that democratizes the creation of personal and financial wealth. She also serves on the corporate boards of Envestnet (NYSE: ENV), DraftKings (NASDAQ: DKNG), Groupon (NASDAQ: GRPN), and Eaton Vance's family of mutual funds.

Valerie retired as a Partner, SVP Portfolio Manager and Investment Strategist from Wellington Management Company, LLP, a $1 trillion global money management firm. During her 20-year tenure, she managed billions for clients, chaired the firm's Industry Strategy Group, and served on several investment strategy groups that set key parameters for team portfolio managers to follow. She invested in public company and structured credit at Wellington and in private and impact company equity through Valmo Ventures.

Valerie is on the board of New Profit, a social venture capital firm. Valerie believes to whom much is given, much is requires and speaks about parallels between managing money and managing life and created financial fluency courses for high school teachers and students.

Valerie graduated with a B.A. in History from Duke, where she served as President of the student body. She earned an M.B.A. in finance from the Wharton School of Business. Valerie has been recognized as "The International Person of the Year" by *The UK's Power List*, One of the 50 Most Powerful Women in Business and one of the Top 75 African Americans on Wall Street by *Black Enterprise Magazines.*

• Biographies continue on next page •

Rich Ratke
Managing Partner, Walton Street Capital

Richard Ratke is a Managing Partner at Walton Street Capital. Richard is a co-founder of the Walton Street Real Estate Debt (WSRED) platform and is a member of the Management Committee and firmwide Investment Committee. In 2013, Richard led the launch of WSRED and growth to nearly $3 billion of equity under management across two commingled, discretionary investment funds and an insurance company separate account. Previously, Richard oversaw the distressed credit investment platform on behalf of Walton Street's opportunistic equity funds.

Prior to Walton Street, Richard was with the investment banking group at Goldman, Sachs & Co. where he focused on corporate finance, M&A and debt securitization in the Real Estate Group.

Richard holds an MBA from the Wharton School at the University of Pennsylvania with majors in Finance and Accounting and a BS in Electrical Engineering from the University of Michigan.

Dr. Wolf von Laer
CEO, Students For Liberty

Dr. Wolf von Laer is the CEO of Students For Liberty, a multi-million dollar non-profit operating in over 100 countries and uses Bitcoin within the business. Wolf is also an advisor to a crypto-hedge fund based in Silicon Valley. Wolf has a passion for Bitcoin and wants to help people around the world to benefit from this amazing technology which promises widespread positive financial and societal impact.

Wolf holds a Ph.D. in Political Economy, a Master's in Economics, and has owned bitcoin since 2013. Wolf has written a book about money and the Federal Reserve and published numerous book chapters and articles about federal regulation, Bitcoin, and financial markets in outlets like the *Wall Street Journal, Forbes, Bitcoin Magazine, CoinDesk, the Hill, Washington Examiner,* and *Huffington Post.*

Kathleen Vogelsang
Chief Investment Officer, Van Andel Institute

Kathleen Vogelsang is the Chief Investment Officer at the Van Andel Institute, responsible for the investment management of the Institute's $1.8B Endowment. Kathleen came to VAI in June of 2005, where she started the Investment Office from the ground up. Prior to VAI, Kathleen was employed at Fifth Third Bank, where she was Vice-President/Senior Portfolio Manager in the Wealth Management Group. Prior to Fifth Third Bank, Kathleen started the investment office and was the Director of Investments for JVA Enterprises, the family office of Jay and Betty Van Andel.

Kathleen serves on the Boards of the Grand Rapids Community Foundation, Meijer Gardens and Sculpture Park, Grand Valley State University Foundation, and Michigan Gift of Life. She is a member of the Investment Committee for Grand Valley State University's Endowment, the Grand Rapids Symphony, Council of Michigan Foundations and the Frey Foundation.

Kathleen received a Bachelor of Business degree in Finance and an M.B.A. from Grand Valley State University and holds the Chartered Financial Analyst (CFA) designation from the CFA Institute. She was named one of the 50 Most Influential Women in West Michigan by the Grand Rapids Business Journal in 2012 and 2014. Kathleen was named one of the 100 Most Influential Women in Michigan by *Crain's Detroit* in 2016, and in 2020, *Crain's Detroit* listed her among Notable Women in Finance in Michigan. Kathleen was named to the Class of 2020 Influential Leaders by the AACSB.

• Biographies continue on next page •

Anthony Waskiewicz
President and Chief Investment Officer, Investment Office Resources, LLC

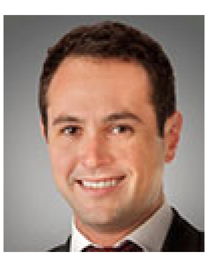
Anthony Waskiewicz is President and Chief Investment Officer of Investment Office Resources, LLC. Anthony is a mission-driven leader, skilled investor and institutional investment expert with over 30 years of industry experience, including nearly 20 years of experience serving in the capacity as Chief Investment Officer. In his capacity as CIO, Anthony built industry recognized investment programs while overseeing multi-asset class reserve, foundation and pension portfolios. Motivated by the pursuit of excellence, a desire to make a difference, and passion to serve others, he is known for his ability to build vibrant cultures where employees are valued and appreciated.

Anthony recently launched Investment Office Resources, LLC (IOR), a shared resource platform supporting internal investment offices of not-for-profit institutions. Prior to launching IOR, Anthony served as Chief Investment Officer for Mercy Health (St. Louis, MO), joining the nation's 5th largest Catholic health system as the system's first Chief Investment Officer. During his tenure, he built a top-performing investment program and team managing the health system's $3B investment program comprising reserve, pension, and foundation assets. Under his leadership, Mercy generated strong risk-adjusted returns while receiving industry recognition, including Institutional Investor Investment Committee of the Year (2018) and Investor Intelligence Healthcare Plan of the Year (2015). During his tenure, Tony was named AI-CIO Healthcare CIO of the Year (2018), Institutional Investor, Healthcare Chief Investment Officer of the Year (2014), and was listed on Trusted Insight's Top 30 Healthcare CIO list. At the conclusion of his tenure at Mercy, Anthony was ranked #31 on *AI-CIO's* Power 100 CIO list.

At Mercy, Anthony hired and mentored an award-winning team, including the team's Deputy CIO being acknowledged as AI-CIO's Next Generation CIO (2019) and the team's Senior Investment Analyst honored as a Top 30 Women Rising Stars in Institutional Investing by *TrustedInsight* (2016).

Prior to joining Mercy Health, Anthony served as Vice President and Chief Investment Officer for the Clark family's holding company, Clark Enterprises, Inc., one of the largest private holding companies in the country, where he successfully led the investment process and achieved strong returns managing five large investment funds. Before joining Clark Enterprises, Inc., Anthony established an investment and institutional management foundation working with and learning from industry leaders at T. Rowe Price, Mercer Investment Consulting, Evergreen Investments and Morgan Stanley.

Anthony earned his M.B.A. with a concentration in Finance, from the Sellinger School of Business Management-Loyola College and B.S. degree in Business Administration from Washington & Lee University. Today, he serves on the investment committees for the Missouri Health Foundation and the Mid-American Transplant Association, and recently completed his term as Chairman of the Board of Trustees at Villa Duchesne and Oak Hill School in St. Louis, where his two daughters recently graduated.



Brett Wayman
Vice President, Impact Investing, Envestnet

Brett Wayman is Vice President, Impact Investing, Envestnet's ESG and impact investing strategic initiatives, including the development and launch of new impact investing technology solutions, investment products, and practice management guidance.

Brett works closely with Envestnet's enterprise clients on making these solutions and products available for their advisors and empower those advisors to understand trends in impact and ESG investing, feel more comfortable having the "values" conversation with their investor clients, and navigate the impact tools and investment strategies available through the Envestnet platform. *(biography continues on the next page)*

Prior to joining Envestnet, Brett spent 10 years in leadership roles with family offices in New York, Princeton, and Atlanta, where he worked with ultra-high-net-worth families on shifting multi-generation assets towards more "impactful" portfolio allocations. Brett has a degree in economics from Emory University.

Joel Wittenberg
Former Vice President and Chief Investment Officer, W. K. Kellogg Foundation

Joel Wittenberg recently retired as Vice President and Chief Investment Officer at the W.K. Kellogg Foundation of Battle Creek, Michigan. He is now independently advising institutional investors.

For the past 11 years, Wittenberg served on the foundation's executive council and was responsible for both Kellogg Foundation and Kellogg Foundation Trust investment portfolios. The foundation is the fourth largest in the U.S. with more than $8 billion in assets.

Prior to joining the foundation, Wittenberg spent nine years as corporate Vice President at the Kellogg Company, serving as Treasurer as well as heading up investor relations.

Before joining the Kellogg Company, he was Vice President and Treasurer with Armstrong World Industries in Lancaster, Pennsylvania, and held several key treasury roles with the Dow Chemical Company of Midland, Michigan.

Wittenberg earned his Bachelor of Science in Accounting and Finance at the Eli Broad Graduate School of Management at Michigan State University, and his Master of Business Administration from the Stephen M. Ross School of Business at the University of Michigan.

• Biographies continue on next page •

Tim Duffy, Esq.
General Counsel and Manager of Strategic Partnerships

Tim is the General Counsel and Manager of Strategic Partnerships at Family Office Exchange (FOX). In his role as General Counsel, Tim maintains FOX's compliance with all existing laws, drafting legal agreements, overseeing outside counsel, and maintaining FOX's intellectual property rights. As Manager of Strategic Partnerships, Tim manages select relationships by developing and implementing long-term partner agreements, fulfilling partner business priorities, and creating "value-added" opportunities for FOX and these strategic partners. Tim also works closely with our Director of Private Investments, leading our DIN Resource Partner initiative that provides increased education and support to actively involved members in the Direct Investment Network.

Tim has more than 15 years of experience in private equity, venture capital, and M&A as both an attorney and entrepreneur. For over a decade, Tim has been involved in the cannabis industry, where he successfully built and sold a vertically integrated medical marijuana company. As an attorney, he has advised clients on over $200 million in M&A transactions and investment initiatives across a broad range of industries.

Tim attended The Ohio State University, where he earned a B.A. in Political Science and was a three-time Big Ten Scholar-Athlete and division one men's lacrosse player. After college, Tim coached Ireland's Men's National Lacrosse team in the 2015 and 2017 World Lacrosse Games. Tim also holds a J.D. from DePaul University College of Law.

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.

Ms. Griffin 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.

• Biographies continue on next page •

Miguel López de Silanes Gómez
Managing Director for International Members

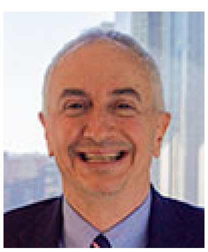
Miguel López de Silanes Gómez is the Managing Director for International Members at Family Office Exchange (FOX). He is responsible for delivering FOX services to current members, and actively works to expand the network in Europe and Latin America.

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.

Nate Hamilton, CFA
FOX Advisory Board Member

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



Matthew Murphy
Director, Business Development

Matthew Murphy is the Director of Business Development at Family Office Exchange (FOX). In this role, he is responsible for leading the initiative in identifying prospective family and advisor members; assessing their needs and priorities to ensure a deep understanding of the benefits of FOX membership.

Matthew has 30 years of client service/business development experience within the wealth and asset management field, most recently as a Vice President, Institutional for Astor Investment Management. Previously, Matthew served as a Senior Consultant for HFR Asset Management. Additionally, he has held various client service/business development positions including Partner/Director-Brinson Partners/UBS Global Asset Management and Founding Partner-Xenon Capital Management, a managed futures CTA. Matthew has a deep understanding and experience in the areas of portfolio diversification and risk management. He also has extensive knowledge related to the due diligence necessary in evaluating potential hedge fund and private equity investments.

Matthew holds a B.A. from Columbia University. He received a M.B.A. from Rensselaer Polytechnic Institute and a M.S. (Finance) from Rensselaer Polytechnic Institute and was awarded a Graduate Fellowship from the Connecticut General Assembly as a quantitative analyst within the Office of Fiscal Analysis.

• Biographies continue on next page •

Stephanie Simmons
Senior Relationship Manager

Stephanie Simmons is a Senior 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.

David Toth
Managing Director

David Toth is a managing director at FOX and is market leader for FOX's Wealth Advisor members. In his role, he serves as Co-Chair for Multi-Family Office and Integrated Wealth Advisor Councils. He also Co-Chairs the Strategic Chief Investment Officer Council, a peer group for family office CIOs.

David serves as relationship manager for select wealth advisors and families providing strategic guidance, access to essential research and offers key insights on issues of importance to them. He has authored, presented, and consulted on topics ranging from client experience and pricing strategies to talent management.

He is as a member of the FOX leadership team, helping to develop and execute strategies designed to better meet member's evolving needs. David also participates in the development of new research and thought leadership for FOX members.

David brings over thirty years of wealth and investment management, marketing, and strategic consulting experience to FOX and its members. 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 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. *(biography continues on the next page)*

• Biographies continue on next page •

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.

• Biographies continue on next page •