Tom Abendroth
Partner, Practice Group Leader, Private Clients, Trusts & Estates, Schiff Hardin, LLP

Tom Abendroth is a partner in the Chicago law firm of Schiff Hardin LLP and practice group leader of the firm's Private Clients, Trusts and Estates Group. He concentrates his practice in the fields of estate planning, federal taxation, and business succession planning. Tom is a 1984 graduate of Northwestern University School of Law, and received his undergraduate degree from Ripon College, where he currently serves on the Board of Trustees.

Tom has co-authored a two-volume treatise entitled *Illinois Estate Planning, Will Drafting and Estate Administration,* and a chapter on sophisticated value-shifting techniques in the book, *Estate and Personal Financial Planning*. He is co-editor of *Estate Planning Strategies After Estate Tax Reform: Insights and Analysis (CCH 2001).* Tom has contributed numerous articles to industry publications, and previously served on the Editorial Advisory Board for ABA Trusts & Investments Magazine. He is a member of the Duke University Estate Planning Council.

Tom is a frequent speaker on tax and estate planning topics at banks and professional organizations. In addition, he is a co-presenter of a monthly teleconference series on estate planning issues presented by the American Bankers Association. He has taught at the American Bankers Association National Graduate Trust School since 1990. Tom is a Fellow of the American College of Trust and Estate Counsel.

Mark J. Blumenthal, CPA
Partner & Practice Leader, Family Office Services, Plante Moran

Mark Blumenthal is a Partner and Leader of the Family Office Service Group at the accounting and business advisory firm Plante Moran in Chicago. He is also the Co-Leader of the Private Equity Venture Capital Fund group in Chicago and one of the senior real estate tax partners of the firm.

Mark serves as a strategic advisor to ultra-affluent families, family offices, private equity/venture capital funds and mature private businesses. He advises clients on buying, selling and investing in private businesses and real estate; the formation of family and investment limited partnerships, family offices and private foundations; and income tax and transaction planning.

Mark has written articles for numerous publications, including *The Illinois Institute for Continuing Legal Education, The Tax Advisor, Taxation for Accountants, The Journal of Property Management, The Real Estate Securities Journal, The Journal of Real Estate Development, Taxation for Lawyers, Real Estate Forum* and *The New York State Bar Association Partnership Handbook.*

Mark's most recent article entitled "Extreme Makeover" appeared in *Worth* discussing the need for family offices to embrace best-in-class management and organizational standards.

Mark has been on the speaker faculty for the Investment Management Consultants Association (IMCA), the Family Office Exchange, The Family Office Forum, Illinois Venture Capital Association (IVCA), the Family Succession Planning Institute, the Family Office Management Conference, Family Office Symposium, the Illinois Institute for Continuing Legal Education, The Chicago Bar Association, IIR's

Mastering Tax & Estate Planning Conference, the Center for Professional Education, and others. He has also been quoted in *The Wall Street Journal, Bloomberg Wealth Manager, The Chicago Tribune, The Los Angeles Times, The Arizona Republic, The Philadelphia Inquirer, Washington City Paper, Accounting Today, Crain's Chicago,* and the *Family Wealth Report.*

Mark received both his Bachelor of Science and Master of Business Administration degrees from the University of Illinois. He is a member of the Chicago Estate Planning Council, the Illinois Venture Capital Association, the Thought Leaders Council of the Family Office Exchange, the American Institute of Certified Public Accountants, the Illinois CPA Society, Legacy Partners at Lurie Children's Hospital, and the JUF Professional Advisory Committee having served as chairman.

Emily Bouchard
Strategic Wealth Coach, Ascent Private Capital Management

A specialist in family dynamics, Emily focuses on the emotional impact of wealth on estate and financial planning. Backed by her extensive experience, she fosters better communication and leadership skills to help multigenerational families successfully transition their businesses, assets and values.

Emily earned her B.A. in child development from the University of Pennsylvania, Philadelphia, and M.S. in social work, with an emphasis on marital and family therapy, from the University of Texas at Arlington. She is also a certified money coach, facilitating over 150 family meetings in the U.S. and internationally. In addition, Emily is an instructor on the complexities of family business transitions for the Exit Planning Institute's Certified Exit Planning Advisor (CEPA) training and a member of the Purposeful Planning Institute (PPI).

The coauthor of *Estate Planning for the Blended Family, Beginner's Guide to Purposeful Prenups* and other publications, Emily hosts a website for blended families, providing resources and strategies to help families overcome their challenges. In her role as an expert in this field, she has appeared on CNN and The Today Show, in *The New York Times* and *Wall Street Journal*, as well as in other media outlets.

Bonnie Gauger
Human Resources Director, Johnson Keland Management, Inc.

Bonnie Gauger is Human Resources Director at Johnson Keland Management, Inc., the Racine, Wisconsin-based Family Office for the individual members of the Samuel C. Johnson and Karen Johnson Boyd families. In addition to 13 years of HR leadership experience in the Family Office industry, she has nearly 20 years of experience in the human resources field, including roles as Vice President of Human Resources and Learning and Development at BNY Clearing, a securities clearing subsidiary of the Bank of New York, and previously held HR and Corporate Training positions at Milwaukee-based Assurant Health.

Bonnie is an active member of the local and national chapters of the Society of Human Resources Management. She is also a dedicated volunteer and advisory committee member for the Wisconsin Humane Society as well as Crossroads Career Network, a program that assists those in job transition. Bonnie holds an MBA degree from the University of Wisconsin-Milwaukee as well as a Bachelor of Business Administration degree from the University of Wisconsin-Parkside.

Wallace L. Head
Vice Chairman, Gresham Partners, LLC

Wally Head leads Gresham's strategic initiatives to grow the business and raise the firm's national visibility and serves as a senior advisor to families and their related entities. Wally draws on over 30 years of experience serving as a senior executive in trust, investment, wealth management and family office advisory firms, and as a personal fiduciary advisor to wealthy individuals and families. As the founder of Personal Fiduciary Advisors, LLC ("PFA"), now a subsidiary of Gresham, Wally provided unconflicted consulting services to banks, family offices, RIAs and wealthy families.

Prior to establishing PFA, Wally was chief executive officer of wealth management at The PrivateBank and Trust Company, where he also served as a member of the Bank's executive committee, a member of its board of directors, and chairman of its trust committee. Previously, Wally was president of Family Office Exchange, LLC, a managing director of Sanford C. Bernstein & Co., and a tax partner and national director with Arthur Andersen & Co.

Wally received his BA from Westminster College and his MBA and JD from the University of Missouri.

Douglas Herman
Principal, Technology & Business Transformation Services, BDO USA, LLP

Douglas Herman is a Principal in BDO's Technology & Business Transformation Services practice with extensive knowledge and experience in litigation preparedness, information management & governance, eDiscovery, digital forensics, data analytics, technology assisted & advanced review mechanisms, dispute resolution, expert testimony, proactive cyber security assessment & incident response, global data privacy regulations & compliance, data center design & implementation, cloud infrastructure design & migration, and business continuity & disaster recovery.

Doug has provided guidance to clients in numerous industries, including: Healthcare, where he has focused on hospitals, physician groups, health plans, clinics, drug and equipment development, and manufacturing; banking & finance; manufacturing & distribution; insurance; education, including public and private school systems, universities, and the Department of Education; and hi-tech, including crypto-currency, web hosting, order fulfillment, advertising, and credit card transactions.

Prior to joining BDO, Douglas was a Partner for UHY Advisors FLVS, Inc. where he led the Discovery Services Practice and also managed the Operations, Project Management and Business Development teams. He has testified on numerous occasions, been designated as an expert for discovery-related matters and published on various topics related to eDiscovery.

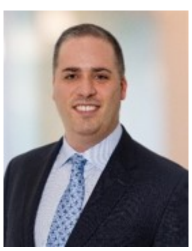
Kim Kamin
Principal and Chief Wealth Strategist, Gresham Partners, LLC

Kim Kamin is a Principal at Gresham Partners, LLC where she serves as Chief Wealth Strategist and a Client Advisor. She leads Gresham's development and implementation of estate, wealth transfer, philanthropic, educational and fiduciary planning activities, and advises clients. Previously she was a partner in the Private Clients, Trusts and Estates Group at Schiff Hardin LLP where for many years her legal practice involved all aspects of trust and estate planning, administration and dispute resolution; advising families and closely held businesses on a wide array of wealth preservation, asset protection and succession planning issues; representing fiduciaries, custodians, and beneficiaries in estate administration and contested trust and estate matters; and serving as counsel for the formation and operation of not-for-profit entities.

Kim is an adjunct professor at the Northwestern University Pritzker School of Law where she has been awarded the William M. Trumbull Lectureship, and has taught Advanced Trusts and Estates, the Income Taxation of Trusts and Estates, and Estate Planning. She is also on faculty for the Certified Private Wealth Advisor® (CPWA®) certification program through the University of Chicago Booth School of Business Executive Education.

Kim is on the Editorial Advisory Board of Trusts and Estates Magazine. She has published on a wide variety of topics and is also a frequent lecturer in a variety of venues (including Family Office Exchange, ALI-CLE, American College of Trust and Estate Counsel, Chicago Estate Planning Council, Chicago Bar Association, Illinois Institute for Continuing Legal Education, Annual Notre Dame Tax & Estate Planning Institute, Tulane Tax Institute, and CLE International's Visual Arts and the Law Conference). She is also an "Xpert" for Trust & Estates' IdeaXchange.

Kim received her B.A., with distinction and departmental honors, from Stanford University and her J.D. from the University of Chicago Law School.



Jason Lipschultz, CPA
Managing Director, Third Party Assurance, BDO USA, LLP

Jason is a Managing Director in BDO's Third Party Attestation and IT Audit practice. He has nearly 15 years of IT and business assurance and advisory process, risk, and controls experience. Jason specializes in third party risk assurance (SOC reporting) and external financial and IT audit.

Jason's passion is to help clients achieve their potential by developing practical solutions to business challenges. His biggest strength is in communication, advising clients through the often complex world of risk and controls to simplify what it means to them and help protect and grow their business.

Daisy Medici
Managing Director of Governance and Education, GenSpring Family Offices

Daisy Medici joined GenSpring Family Offices in 2006 and is the Managing Director of Governance and Education. In addition to her primary role, Daisy oversees GenSpring's Women & Wealth Initiative and is a member of GenSpring's Leadership Team. For two consecutive years, Daisy has been named as one of The 50 Most Influential Women in Private Wealth by *Private Asset Management* (PAM) magazine (2015, 2016).

Daisy focuses much of her time developing and administering GenSpring's proprietary tools and processes specifically designed to help families increase their chances of sustaining wealth over generations. Daisy leads a team of GenSpring professionals skilled in the non-investment components of these processes, who work alongside GenSpring's advisors as they help client families identify wealth objectives and develop appropriate methods for governing their shared assets.

Daisy is a frequent speaker on the topic of family governance and all that effective governance involves. Among the many topics Daisy addresses are Family Communication, Family Conflict and Recovering Trust, Non-investment Risk Management, as well as the Emotional Impacts of Wealth and the importance of Family Governance & Family Policies in Sustaining Wealth across Generations. Daisy has been a contributing author for *Families in Business* magazine and was recently published in *Family Business magazine.*

Daisy brings to GenSpring Family Offices extensive experience in the family business space. Prior to joining the firm, Daisy was a partner at The Roseview Group, an investment banking and family business advisory firm where she worked with client families and focused on new business development and marketing. Prior to Roseview, she was Managing Director of Genus Resources, LLC, a business consultancy catering exclusively to the needs of family enterprises.

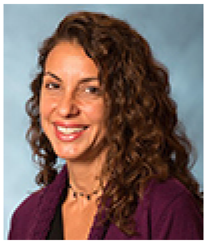
Daisy earned her graduate degree in Communications Management at Simmons College in Boston, MA, and is a certified administrator of the Myers Briggs Type Indicator (MBTI). She has been an active member of The Family Firm Institute for many years and served twice as co-chair of their annual conference. Daisy currently co-chairs the Program Committee for the Family Firm Institute's New England Chapter. In addition to her career, Daisy's main passion is her large, loving, gregarious family who span the country from coast to coast. Daisy hails from a family who proudly spent five generations in the newspaper business.

Domingo P. Such, III
Partner, Firmwide Chair, Family Office Services, Perkins Coie, LLP

Domingo Such is based in the Chicago office, focusing his practice on excellence in the delivery of legal advice that is results oriented. He serves as the Chair of the Family Office Services group, a multi-disciplinary practice representing operating companies, boards of directors, fiduciaries, beneficiaries, family offices including trust companies and quasi-family office arrangements. Domingo has been cited in *Business Week, The Wall Street Journal*, *Worth, Bloomberg* and *Crain's Business Magazine*, and is a frequent author with multiple published articles on tax planning matters.

Domingo lectures nationally on trust and business planning involving complex estates and trusts which are at times contested in court. He received his undergraduate and MBA from Washington University in St.

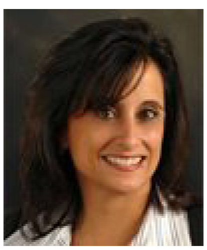
Louis, and his law degree from the Loyola University of Chicago School of Law. He also earned his Certificate in Family Business Advising from the Family Firm Institute. He is listed in *Who's Who in America and Best Lawyers in America*, *Super Lawyers,* and is a fellow of the American College of Trust and Estate Counsel (ACTEC), which reflects his experience, integrity and overall recognized professional excellence



Margalit Tocher
President, Home Care Assistance of Greater Chicago, LLC

Margalit is an owner and President of Home Care Assistance of Greater Chicago LLC. She first became interested in homecare when her grandmother wished to continue to live at home but needed assistance to do so. By owning and leading Home Care Assistance, Margalit had a deeper role as care provider *and* client as her grandmother aged at home.

Margalit has more than 30 years of business leadership, including 15 years in healthcare related companies. Prior to joining Home Care Assistance, Margalit held the position of Chief Operating Officer of Haemoscope Corporation, a family-owned hemostasis medical device company serving markets around the world. Earlier in her career, Margalit led eCommerce efforts for Kinko's (now FedEx Office). Margalit is the first recipient of the North Shore Women in Business award in the healthcare category. She holds a BA from UCLA and an MBA in Entrepreneurship from Loyola Marymount. She is also on the Board of Directors of Coramed Technologies, LLC, a leader in the field of hemostasis monitoring



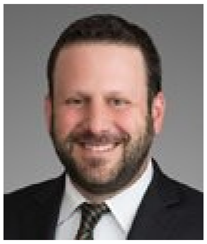
Danielle Valkner, CPA
US Family Office Leader, PwC

Danielle Valkner has over 25 years of industry experience in financial services and is focused on providing management and operational consulting services to hedge, private equity, family offices and asset servicing clients.

Danielle has worked on multiple engagements focusing on process improvement and target operating model design, finance effectiveness, due diligence, risk management, vendor selection and middle and back office system development and implementation. Prior to joining PwC, Danielle worked directly for two large global asset managers, gaining extensive industry experience in Chief Financial and Chief Administrative Officer roles, responsible for all aspects of middle and back office operations, infrastructure, finance and accounting.

She also spent over 10 years as an auditor in the financial services sector specializing in banking, asset management and brokerage gaining valuable experience with global banking operations, broker dealers, hedge funds, private equity, commercial real estate and complex financial instruments.

Danielle graduated summa cum laude from Augustana College where she majored in Accounting and Business Administration with concentrations in Finance and Economics. She is a CPA and received state and national honors related to the certification exam.



Nicholas Van Brunt
Partner, Sheppard Mullin

Nicholas Van Brunt is a partner in the Business Trial Practice Group, based primarily in the firm’s Century City office and is the Co-Team Leader of the firm's Private Wealth Services Team.

Nicholas focuses his practice on resolving disputes over trusts, estates, conservatorships, and other fiduciary matters. A respected member of the Los Angeles legal community, he is known as a pragmatic and effective advocate who seeks to achieve favorable results for his clients through a combination of skillful negotiation, strategic counsel and deft trial work. As such, Nicholas has developed an impressive roster of clients who value his discretion, experience and accessible approach to client relations. Whether in the courtroom or at mediation, it is his ability both to advocate passionately and effectively for his clients and to counsel clients compassionately but credibly that has helped him consistently achieve favorable outcomes on their behalves.

As an experienced trusts and estates litigator with a strong background in general business litigation, Nicholas has represented corporations, non-profit organizations and individuals in matters large and small, through mediation, settlement negotiation and, when necessary, trial preparation and execution. His typical client matters include will and trust contests, breach of fiduciary duty cases, trustee accounting matters, conservatorship proceedings, and cases involving the intersection between probate law and other legal issues. Nicholas also has substantial general business litigation experience, including disputes arising in labor and employment, intellectual property, securities, real estate, professional responsibility matters, judgment collection, bankruptcy matters, and general breach of contract and tort actions.

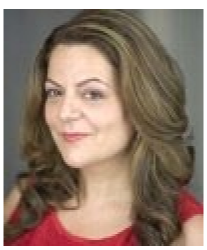
Nicholas is actively engaged in pro bono matters on behalf of both individuals and non-profit organizations and also serves as a Probate Settlement Officer with the Los Angeles County Superior Court’s Pro Bono Probate Settlement Program, offered through the San Fernando Valley Bar Association.

Heather Asher Abramson
Regional Director Membership, West

Heather Abramson is the Regional Director of Membership for Family Office Exchange (FOX). Heather has three major roles at FOX. First, she provides a variety of member services and supports the specific needs for family business-owning members. Secondly, Heather is a member of the FOX member development team and assesses the needs of prospective FOX members by helping them achieve their goals. Heather also runs FOX's Rising Gen Community, which is designed to provide next-generation family members an opportunity to learn, share experiences, and develop skills as future leaders.

Before joining FOX in 2008, Heather served as Strategic Marketing and Events Manager at Aon Corporation. While at Aon, Heather planned and executed more than 100 large-scale events and created the marketing and project execution for Aon's South America Division. Earlier in her career, she worked on Capitol Hill for a U.S. senator and in the foreign policy department at a lobbying organization. She also has previous experience working in a Chicago-based family office.

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



Sandra Ditore
Regional Director, Membership, East

Sandra Ditore is Regional Director of Membership for the East Region at Family Office Exchange (FOX). In her role, she is responsible for identifying prospective family and advisor members, assessing their needs and priorities, and ensuring they have a deep understanding of the benefits of FOX membership. In addition to new member acquisitions, Sandra is responsible for identifying and securing sponsorship for FOX forums and educational workshops.

Sandra has more than 25 years of experience in sales and marketing. Before joining FOX in 2002, Sandra was a Senior Account Manager for a Chicago-based healthcare communications firm, where she developed marketing strategies for global pharmaceutical brands. Prior to this, she held research and marketing positions at several Wall Street investment banking firms, including Drexel Burnham Lambert, Dean Witter Reynolds, and Dillon Read & Co.

She is a member of Alliance of Mergers & Acquisition Advisors (AM&AA) and Family Firm Institute (FFI).

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

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.

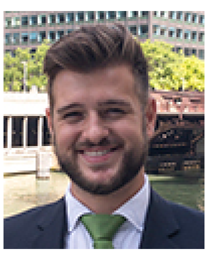
Mindy has held various roles in small and large family offices and has been responsible for creating and stewarding professional learning networks in support of human and intellectual capital. She has designed learning experiences that increase the knowledge base and enhance the life path of individuals 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.



Michael Calvo Elhauge
Relationship Manager, Europe & Latin America

Michael Calvo Elhauge is a Relationship Manager for Europe and Latin America with the Family Office Exchange (FOX). In his role he supports FOX's international families and advisors by providing bespoke solutions to the challenges they face. Michael also serves an ambassador for new and prospective members through finding ways to address their challenges with the resources available at FOX. He is based in the Chicago office.

Previously, Michael spent a year working with Trusted Family managing their clients in the Americas, guiding multi-generational families with respect to governance, education, family engagement, NextGen development, and communication. Before that Michael worked in direct investment for a single family office, specializing in real estate, where he was responsible for sourcing co-investment.

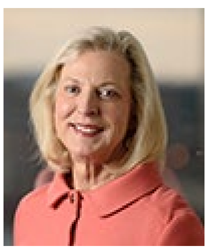
Michael is a graduate from NYU's Stern School of Business where he majored in finance and marketing. He has lived in 6 countries across 3 continents, he fluently speaks Spanish and Portuguese.

Tony Gebely
Chief Technology and Integration Officer

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.



Sara Hamilton
Founder and CEO

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX). She is a recognized visionary and credited with professionalizing the family office industry. Sara founded 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, managing financial transitions, and educating family members on responsible ownership.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting enterprise families, family office executives, and wealth advisory firms in more than 27 countries. FOX has built a unique team of professionals serving multi-generational families, led by 20 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, and Madrid.

Sara is the co-author *of Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times.* She also 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. She is on the founding boards for the International Private Directors Association and the Foundation for Gender Equality.

Vincent Hayes
Director of Member Development

Vincent Hayes is the Director of Member Development at Family Office Exchange (FOX). Vincent serves as the ambassador for FOX in reaching out to new members and promoting the networking and education benefits that come with FOX membership. He helps prospective members find ways to solve the challenges they face in running their family enterprises using resources available within FOX and its membership community.

Prior to joining FOX, Vincent spent 15 years in the investment world, most recently with AGN Futures, where he served as Vice President of Sales and Operations since 2011. Previously, Vincent has worked at R.J. O'Brien & Associates, Global Forex Trading, and ZAP Futures.

Vincent is a graduate of Western Michigan University with a B.B.A. degree in Finance and minor in Accounting. He is based in Chicago.

Glen W. Johnson
Market Leader, Business Owners and Family Office Executives

In his role as Market Leader, Glen Johnson works closely with business owners and family office executives to help them address their goals and challenges. Glen is part of the leadership team at FOX and leads all aspects of the member experience for family and family office Councils. FOX Councils meet twice a year and provide members with opportunities to learn from and share ideas with highly accomplished and hard-to-find peers in a confidential environment.

Glen has over 30 years of experience working with 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 is a passionate supporter of cultural organizations and groups seeking to enhance the lives of youth. He has served as a board member and advisor of various local and regional boards including The Michigan Theatre, Meijer Gardens Sculpture Park, The Boys and Girls Club of Detroit, and the Grand Rapids Community Foundation.

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.

Karen Kaufman
Director, Human Capital

Karen Kaufman is the Director of Human Capital at Family Office Exchange (FOX). She is focused on translating business vision into HR strategy. This includes all aspects of the employee life cycle (recruitment, on-boarding, performance management, talent development, employee relations), organizational design, culture and compliance. She also runs FOX's Human Capital (HCAP) Network, providing members with the tools they need to succeed for all HR related matters.

Prior to joining FOX, Karen has over 20 years of experience supporting diverse employee populations in different industries, including, hospitality, entertainment, high technology, telecommunications and professional services, large organizations and small.

Karen received her B.A. in Human Resources Management from DePaul University.

Hilary Leav
Director of Research

Hilary Leav is the Director of Research for Family Office Exchange (FOX) Networks. In her role, she supports FOX's research efforts: seeking to gather insights into the world of the families and family offices in FOX's networks.

Hilary has worked in research, evaluation, and data analytics for over 7 years. Prior to joining FOX, her work was largely internationally based with a strong focus on nonprofit market research and program evaluation. Hilary has also worked in program management, strategic planning, process improvement and business analysis for both non-profit and privately held companies.

Hilary earned her M.S. in Measurement and Evaluation from American University. She completed her undergraduate studies at the University of Michigan, receiving dual degrees in Cultural Anthropology and History of Art.

Robin L. Letchinger, JD
Enterprise Family Market Leader

Robin Letchinger is the Enterprise Family Market Leader for FOX.
In her role, she develops and grows the Enterprise Family Center- a unique network of 100+ multi-generational families who strive to build and retain an enterprise family. Robin advises families on identifying opportunities and risks, allocating family capital, optimizing their governance structures, and educating the rising generations about life-long learning and leadership.

Robin brings over 25 years of strategic problem-solving to FOX honed through her experiences as a General Counsel, Board Member and Compensation Committee Chair for a 4th generation family holding company, law firm partner serving family-owned businesses, and Director on various non-profit boards. She received her J.D. from the Northwestern University Pritzker School of Law and her B.S. in Finance, with highest honors, from the University of Illinois, Urbana-Champaign. She also attended the Northwestern Kellogg Executive Education program on *Governing Family Enterprises*. She currently serves on the boards of Hoffberger Holdings, Inc., a 5th generation family holding company, and Open Communities, a non-profit organization focused on eradicating housing discrimination in Chicago's northern suburbs. She was a two-term member of the Board of the Chicago Foundation for Women.

Patience Y. Marmer
Senior Relationship Manager

Patience Y. Marmer is a Senior Relationship Manager with Family Office Exchange (FOX). 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.

Patience has been serving as a trusted advisor to ultra-wealthy individuals and family office clients for 20 years. She is a family office generalist with deep areas of expertise in loss prevention and insurance risk management, global fine art collection operations, multi-estate and stable management, luxury service operations, and special projects.

Patience presently serves on the Board of Trustees for the Private Risk Managers Association. She has worked in many of the 42 countries she has visited and proudly served on the world's largest nongovernmental hospital ship, the M/V Anastasis, for 3 years. She studied Fine Art and History at the University of Illinois and The Art Institute of Chicago.

Alexandre Monnier
President

Alexandre Monnier is President of Family Office Exchange (FOX), a global organization that helps wealthy families and their advisors master the unique challenges inherent to wealth ownership. FOX's support includes networking opportunities, knowledge, advice and education on key topics such as managing wealth, family governance, legacy, succession and best practices for running family offices.

Alexandre oversees FOX globally and has extensive experience in creating, marketing, and delivering premium services to families of wealth in the wealth management, private aviation and healthcare industries—both in the U.S. and internationally.

He joined FOX from PinnacleCare, a leader in private health advisory services, where he led the development of the business in the U.S. and in Europe. Earlier Alexandre ran Skyjet, Bombardier Aerospace's private jet charter business, transforming the business from an emerging player to a leading private jet travel provider.

Previously, Alexandre spent 10 years as a management consultant serving some of the most widely recognized firms in the U.S. and Europe on issues ranging from strategy to operational and organizational effectiveness. He started his career in finance with Societe Generale.

Alexandre is a graduate of ESCP Europe, one of Europe's leading business schools. He has been a member of Young Presidents' Organization since 2005.

Kara Murphy
Program Manager

Kara Murphy is the Rising Generation Program Manager for Family Office Exchange. In her role, she creates opportunities for Rising Gen members at FOX to problem-solve, share their experiences with peers, and equip themselves with all the tools they need to be successful in their enterprise family.

Kara is a graduate of Tulane University, where she received her BA in English and Music Technology. After college, she served as a Teach for America Corps Member within Chicago Public Schools, teaching high school English and coaching a traveling Spoken Word team. She returned to the Crescent City a few years later to broaden her experience in urban education. While teaching in New Orleans, she continued to develop her skillset with best pedagogical practice and design thinking through rigorous training programs and fellowships. She is looking forward to marrying her love for high-tech learning tools and curriculum planning as she seeks to build out informative and engaging programming for the Rising Generation.

Karen Rush
Managing Director, Membership

Karen Rush is Managing Director of the Family Office and Wealth Advisor Markets for Family Office Exchange (FOX). Karen 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.

Miguel López de Silanes Gómez
Managing Director, Market Leader for Europe and Latin America

Miguel López de Silanes Gómez is the Market Leader for Europe and Latin America 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.