We endeavor to find the **best experts and notables** in the family office industry to educate our membership

FOA Fall Global Summit

Expert Biographies

FAMILY OFFICE ASSOCIATION

BIOGRAPHIES

Howard Cooper
Founder & Chairman,
Cooper Family Office

Professor John M. Mulvey

Fredda Herz Brown
Principal, Relative Solutions

James Chanos
Founder & Managing Partner,
Kynikos Associates LP

Adam Stern
Principal & Investment Committee Member, Oakmont Corporation

Michael Reeber
Principal, Co-Founder,
Andalusian Capital Partners, LP

Daniel Riley
Co-Portfolio Manager,
New Mountain Vantage

Mark Lee
Managing Member & Portfolio Manager, Mountaineer Partners

Jimmy C. Chang
CFA, Managing Director and Senior Portfolio Manager,
Rockefeller Asset Management

Yvette Klevan
Director, Portfolio Manager/Analyst,
Lazard Asset Management LLC

Jay Girotto
President,
Farmland Opportunity

Ralph E. Lerner
Of Counsel,
Withers Bergman LLP

Sam Zell
Chairman,
Equity Group Investment

Robert D. Stock, PhD
Director Capital Markets,
Spruce Private Investors, LLC

Jeff Applegate
Chief Investment Officer,
Morgan Stanley Smith Barney

Joseph P. Quinlan
Managing Director &
Chief Market Strategist U. S. Trust,
Bank of America Private Wealth Management

Alan C. "Ace" Greenberg
Vice Chairman Emeritus,
J.P. Morgan

Greg Coules
Managing Director, Co-Head Family Office & Endowment Practice,
Hunter Advisors

About the Family Office Association

The Family Office Association (FOA) is a global membership organization exclusive to single family offices and families of wealth. We are based in Greenwich, Connecticut but have members from all over the United States and around the world. Our membership realizes the value of coming together in a confidential setting to share ideas and compare notes. The Family Office Association seeks to provide the combination of privacy and openness where relationships of trust can grow.

1. Preservation of family wealth
2. The fostering of Stewardship in the next generation, and
3. The expansion of family philanthropic Legacy

Howard Cooper

Founder & Chairman, Cooper Family Office

Summit Chair

Howard Cooper began his career aggressively trading equities for his own account, becoming a full-time trader in the mid-80s. In 2006, Mr. Cooper established a single-family office to manage his family assets, which were derived from his stock trading endeavors. His SFO has transitioned to global investing primarily in alternative investments, including hedge and private equity funds. He is an honors graduate of Princeton University.

Mr. Cooper's spare time is devoted to his favorite philanthropic endeavor of supporting music and art education among underprivileged students, and he has established a family foundation to support these causes. He is the chairman of the new board on Family Offices, Endowments and Foundations at Princeton and chairs the Family Office Council at the NYU Stern School of Business which he coordinates with the faculty. Howard Cooper is a an advisor to the Princeton University Dept. of Astrophysical Sciences, Chairman of the University of Florida Dept. of Astronomy Advisory Council, a member of the Board of Directors of Florida Atlantic University and an advisor to several university academic advisory councils and a member of the 14-10 Investment Fellowship of the Royal Institution of Great Britain. He serves on the boards of several non-profit organizations and foundations and is on the Advisory Board of the Family Office Association and serves on the Hedge Fund Leadership Council and the Advisory Board for Institutional Investor. Howard Cooper resides in Palm Beach.

The Cooper Family Office is invested in over 80 funds, in North and South America, Europe and Asia, as limited partners, in managed accounts and as direct equity investors. The Cooper Family Office also partners with a number of Asian and European FOs, with which they research and invest in opportunities in China, Australia and Eastern Europe, along with frontier markets. The Office is especially proud of working with numerous other family offices throughout the world in evaluating funds, building family office investment committees, seeking new opportunities and funding direct investments.

Professor John Mulvey

Co-Presenter

Morning Closed Door SFO Peer-to-Peer Sessions

Professor John M. Mulvey is an internationally recognized expert in the field of advanced portfolio models. He has three decades' experience using high performance computers and optimization algorithms to solve complex portfolio modeling problems. He has worked with a number of leading financial companies on risk management and asset allocation issues including American Express, Towers Perrin-Tillinghast, Pacific Mutual, and St. Paul Insurance. In addition, Prof. Mulvey has built significant planning systems for government agencies, including the Office of Tax Analysis for the Treasury Department, and the Joint Chiefs of Staff in the Defense Department. He has edited five books and published over 120 papers in the areas of finance, optimization, and alternative investments. Prof. Mulvey has been a member of the Bendheim Center for Finance at Princeton University since its founding in 1999, and a faculty member at Princeton University for the past 32 years. Before coming to Princeton, he taught at Harvard Business School. Prof. Mulvey earned his Ph.D. from UCLA. Prof. Mulvey also is the Chairman and Founder of DPT Capital Management, LLC.

"Professor Mulvey is participating through the courtesy of Howard Cooper, Summit Chair."

Fredda Herz Brown

Principal, Relative Solutions

Co-Presenter

Morning Closed Door SFO Peer-to-Peer Sessions

Fredda Herz Brown, PhD is widely recognized for her extensive, thoughtful contributions to family enterprises and closely held companies and has vast experience working with affluent families, and particularly women. Her career in working with families who share substantial assets began almost twenty years ago after she completed a research project examining successful first to second generation transitions. Her research began at The Family Institute of Westchester, a world-renowned postgraduate training center in family systems work, which she founded with several colleagues. She is a founding Board member of FFI, winner of the Richard Beckhard Practice Award and the Hollander Award and author of numerous articles and the highly acclaimed book Reweaving the Family Tapestry. She is currently working on two books, which highlight the 7 Principles for Raising Responsible Children in a world of privilege and materialism.

James Chanos

Founder & Managing Partner, Kynikos Associates LP

Morning Keynote

9:30am - 10:15am

Contact
Brian Nichols
bnichols@kynikos.com

Jim Chanos is the founder and Managing Partner of Kynikos Associates LP. As the world's largest exclusive short selling investment firm, Kynikos Associates LP provides investment management services for domestic and offshore clients. Through investment funds, partnerships, corporations, and managed accounts – domestic and offshore – Kynikos Associates LP maintains private portfolios of securities for clients. The Ursus, Kriticos and Kynikos Opportunity funds seek to profit from the unusually high alphas found on the long and short side of the U.S. and non-U.S. equity markets.

Mr. Chanos opened Kynikos Associates LP in 1985 to implement investment strategies he had uncovered while beginning his Wall Street career as a financial analyst with Paine Webber, Gilford Securities, and Deutsche Bank. Throughout his investment career, Mr. Chanos has identified and sold short the shares of numerous well-known corporate financial disasters; among them, Baldwin-United, Commodore International, Coleco, Integrated Resources, Boston Chicken, Sunbeam, Conseco, and Tyco International. His celebrated short-sale of Enron shares was dubbed by Barron's as "the market call of the decade, if not the past fifty years." The media has noted his prescience in alerting finance ministers and others about the global financial crisis well before if occurred. His views on the lessons from the crisis, capital markets regulation, and investment strategies, among other topics, are regularly covered by news organizations worldwide.

Mr. Chanos is chairman of the Coalition of Private Investment Companies, whose members are diverse in their size and investment strategies. The members' clients include pension funds, asset managers, foundation, other institutional investors, and qualified wealthy individuals. In that role, Mr. Chanos has testified before Congress and provided comments to regulations proposed by the U.S. Securities and Exchange Commission and the Financial Services Authority in the United Kingdom. (Learn more at: www.hedgefundfacts.org and www.financialdetectives.org.)

At the Yale University School of Management, Mr. Chanos is a Visiting Lecturer in Finance, teaching a class on the history of financial fraud.

Born and raised in Milwaukee, Wisconsin, Mr. Chanos lives in New York City, and has four children. He is President of the Board of Trustees of The Browning School, and serves as a Trustee at The Nightingale-Bamford School and The New-York Historical Society. Mr. Chanos received his BA in economics and political science in 1980 from Yale University.

Adam Stern

Principal & Investment Committee Member, Oakmont Corporation

Moderator

Alpha Generating Strategies
by Leading Managers

10:15am - 11:00am

Contact
Adam Stern
adam@taborlake.com

Adam Stern and his family have been associated with Oakmont Corporation for 8 years. Oakmont is a Los Angeles based family office that services two multi-generational families. As a client, Adam has been actively involved with Oakmont and serves as a trustee and provides investment oversight of several multi-generational trusts for his family. He is actively involved in building, diversifying and protecting his family's estate. This ranges from public market investments and hedging, to sourcing limited partnerships in diverse global hedge funds, private equity and venture funds. As a big proponent of direct company investing, Adam has vetted and actively monitors direct angel investments in a diverse group of businesses such as companies developing algorithmic global locations and unique social network shopping, to more traditional leveraged finance investing in bathroom supplies and go-cart tracks, and even Major League Baseball, where his family is a part owner of the Milwaukee Brewers.

Adam has enjoyed a fruitful career in financial services and has been responsible for cultivating and ushering newly emerging asset classes into the mainstream realm of traditional and alternative investments. Adam began working on Wall Street selling convertible bond securities at Union Bank of Switzerland and Deutsche Bank. At Deutsche Bank he became Head of US Convertible Bond Sales. Adam parlayed this breadth of experience and co-founded his own hedge fund, AM Investment Partners, which was one of the first asset management firms to offer investors exposure to Volatility Arbitrage and tail hedging programs. In addition to operating an array of Volatility Arbitrage products, his fund also managed strategies including Convertible Arbitrage, Equity Long Short, and Merger Arbitrage. All strategies, through acquisition and/or distribution, managed over $100 million and, collectively, reached $1 billion. Adam is currently a Managing Director at Los Angeles based Crescent Capital Group with over $10 billion in assets invested in across a range of credit products. Adam's diverse investor base included the most prestigious institutional, high net worth, endowment, pension and fund of hedge fund investors, spanning the globe. Adam has served as a board member of the JCC in Manhattan, on the investment advisory board for the Rippowam Cisqua School, and as trustee for several philanthropic organizations. Mr. Stern attended Trinity College in Hartford, Connecticut where he graduated with a Bachelor of Arts in Economics.

Michael Reeber

Principal, Co-Founder of Andalusian Capital Partners, LP

Featured Speaker

Alpha Generating Strategies
by Leading Managers

10:15am - 11:00am

Contact
Michael Reeber
Principal & Co-Founder

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- Co-Founded Agamas Capital Management, LP in 2004, an asset management company focused on relative value and special situations investing. Since inception, was the Portfolio Manager of Corporate Securities and a member of the Management and Investment Committees

- Managing Director at Deutsche Bank from 1997 through 2003. Head of Asian Equity Derivatives and Japanese Cash Trading from June 2001 through August 2003, based in Tokyo. During this time, responsible for Asian program trading, regional prime brokerage, Japanese cash trading and Asian equity derivatives. Global Head of Convertibles, based in New York from June 1998 through June 2001, where he managed sales, trading, research and pricing of new issues. Hired in January 1997 by Deutsche Bank to build the firm's U.S. convertible sales, trading and research capabilities

- From 1988 until 1997, employed by Salomon Brothers and was responsible for trading U.S. convertibles for the U.S. proprietary desk and for customer facilitation from 1991 through 1997. Served as an analyst for bond market research for two years beginning in 1988 before completing Salomon's in-house training program in 1991

- Design engineer with Pratt & Whitney in Connecticut from 1987 until 1988

B.S. in Mechanical Engineering from Cornell University, a Masters of Engineering with a concentration in Aerospace Engineering from Cornell University and an M.B.A. from New York University

Daniel Riley

Co-Portfolio Manager, New Mountain Vantage

Featured Speaker

Alpha Generating Strategies by Leading Managers

10:15am - 11:00am

Contact

David C. Coquillette
Managing Director
New Mountain Capital LLC

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Daniel Riley, Co-Portfolio Manager, joined New Mountain in 2002. He was a private equity professional at New Mountain from 2002-2007, working on investments in a wide range of industries including business services, healthcare and financial services. He joined the Vantage team in 2007, and was later named Co-Portfolio Manager. Dan previously worked in the Financial Sponsors Group at Credit Suisse First Boston. He received his A.B. in History from Princeton University.

Mark Lee

Managing Member & Portfolio Manager, Mountaineer Partners

Featured Speaker

Alpha Generating Strategies by Leading Managers

10:15am - 11:00am

Contact

Mark Lee

Mountaineer Partners

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Prior to founding Mountaineer, Mark Lee was at Contrarian Capital for 11 years where he managed two hedge funds. In 2003, Mark founded Contrarian Long Short which was an opportunistic value fund investing up and down the capital structure (equity and distressed debt) and was the sole Portfolio Manager of the fund until his departure in January 2011. Over the eight years that Mark managed Contrarian Long Short, he generated net returns of over 11% and reached peak AUM of $400 million. Over the same period, the S&P generated returns of 7.3%. During 2008, he successfully protected capital per the fund?s mandate: CLS was down 16 bpts.

In addition to founding and running Contrarian Long Short, Mark Lee was the Portfolio Manager of Contrarian Distressed Equity for 2 years which was focused on deep value investments at the bottom of the capital structure. He generated net returns of 27% during his tenure as Portfolio Manager. Over the same period, the S&P generated returns of 21%

Mark?s experience prior to Contrarian Capital includes Blavin & Co (value equity hedge fund), Centre Partners (Lazard affiliated private equity fund) and CS First Boston (mergers and acquisitions analyst). Mark holds an MBA and an AB in Economics from Harvard.

Jimmy C. Chang

CFA, Managing Director and Senior Portfolio Manager,
Rockefeller Asset Management

Featured Speaker

Europe/Asia: How Families are Investing in a Today's Environment

11:15am - 12:00pm

Contact
Loraine Tsavaris

Ph: 212-549-5302
ltsavaris@rockco.com

Jimmy has been involved with the financial markets since 1994. Prior to joining Rockefeller Financial in 2004, Jimmy served as a Senior Vice President, Chief Technology Strategist and Senior Technology Analyst at the U.S. Trust Company of New York, where he led technology equity research and co-managed a technology fund. Jimmy had also served as a Senior Marketing Representative and an Advisory Systems Engineer at International Business Machines Corporation (IBM) from 1985 to 1994, where he was responsible for client relationship management, business volume and profit attainments at major international financial services and banking accounts. He serves on the Investment Committee of the Foundation for Contemporary Arts. He is a member of the Tau Beta Pi National Engineering Honor Society. Jimmy graduated summa cum laude with a B.S. in Electrical Engineering from Cooper Union and holds an M.B.A. in Finance/International Business from New York University.

Yvette Klevan

Director, Portfolio Manager/Analyst, Lazard Asset Management LLC

Featured Speaker

Europe/Asia: How Families are Investing in a Today's Environment

11:15am - 12:00pm

Contact

James F. Harmon
Senior Vice President

Lazard Asset Management
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New York, NY 10112

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Yvette Klevan is a Portfolio Manager/Analyst on the Global Fixed Income team. She began working in the investment field in 1982. Prior to joining Lazard in 2002, Yvette was a Senior Portfolio Manager with Offitbank. Previously she worked at Bank of America, Chase Manhattan Bank and Aramco Services Company. Yvette has an MBA in Finance and Management Information Systems from the University of Houston and a BBA in Mechanical Engineering Route to Business from the University of Texas.

Jay Girotto

President, Farmland Opportunity

Featured Speaker

Single Family Offices
Investing in Farmland

12:00pm - 12:45pm

Contact
Jay Girotto

Ph: 425-301-0728
jgirotto@farmopp.com

Jay is President of Farmland Opportunity. At Farmland Opportunity, Jay is responsible for leading the team of professionals in the origination, assessment, and management of farmland investments. He manages $80M in capital invested in row crop farmland across the Midwest. A native of Cedar Rapids, IA, he comes from a family of Kansas homesteaders that has been involved in agriculture for three generations.

Prior to starting Farmland Opportunity, Jay spent a decade as a technology entrepreneur. He served in product management roles at Homestead Technologies which was sold to Intuit and DemandTec which successfully completed a public offering. He also worked at Microsoft, leading teams of engineers within Windows and Bing.

Jay received his MBA from Harvard Business School. He received his Bachelor of Arts degree in Government and Economics with High Distinction from Harvard University, where he won the Hoopes Prize for his senior thesis about education policy.

Ralph E. Lerner

Of Counsel, Withers Bergman LLP

Featured Speaker

Planning for Art - What Should You Do And What Is New

1:45pm - 2:30pm

Contact
Ralph Lerner
ralph.lerner@withers.us.com

Ralph E. Lerner is the preeminent attorney practicing full time in the field of art law. He is counsel at Withers Bergman LLP and the co-author of the award-winning treatise, ART LAW: The Guide for Collectors, Investors, Dealers and Artists (First, Second and Third Edition), acclaimed as the “industry bible” by Forbes Magazine. He has served as Chairman of the Art Law Committee of the Association of the Bar of the City of New York, Chairman of the Fine Arts Committee of the New York State Bar Association and Chairman of the Visual Arts Division of the American Bar Association Forum on Entertainment and Sports Law. He is currently on the Board of the New York Volunteer Lawyers for the Arts and is a Fellow of the American College of Trusts and Estates Counsel. Lerner is a nationally-acclaimed speaker and writer on the topic of tax-planning for collectors and artists. He has extensive experience in dealing with the Internal Revenue Service in the broadest possible manner and numbers among his clients many of the foremost artists, collectors and art dealers in America.

Sam Zell

Chairman, Equity Group Investment

Afternoon Keynote

2:30pm - 3:15pm

Contact
Terry Holt
Equity Group Investments

THolt@egii.com

Sam Zell is chairman of Equity Group Investments LLC (EGI), the private, entrepreneurial investment firm he founded more than 40 years ago. Mr. Zell's investments span industries and continents, and include interests in real estate, energy, logistics, transportation, media, and health care. He is recognized as a founding father of today's public real estate industry after creating three of the largest real estate investment trusts (REITs) in history.

Mr. Zell is also co-founder and chairman of Equity International, a private investment firm focused on real estate-related companies outside the U.S. He has been particularly active with Equity International's publicly held portfolio companies, three of which are listed on the New York Stock Exchange: Gafisa (GFA), a leading homebuilder in Brazil; Xinyuan (XIN), a fast-growing regional homebuilder in China; and Homex (HXM), Mexico's leading homebuilder. A fourth, BR Malls, Brazil's largest retail property owner and operator, is listed on the Bovespa (BZ:BRML3).

Mr. Zell maintains substantial interests in, and is the chairman of, five other public companies listed on the New York Stock Exchange: Equity Residential (EQR), the largest apartment REIT; Equity LifeStyle Properties (ELS), a REIT that owns and operates manufactured home communities; Capital Trust (CT), a specialized real estate finance company; Covanta Holding Corp. (CVA), an international leader in converting waste to energy; and Anixter (AXE), a value-add provider of integrated networking and cabling solutions that support business information and network infrastructure requirements. Mr. Zell is also the chairman of Tribune Company, a private media conglomerate.

Previously, Mr. Zell served as chairman for Equity Office Properties Trust (EOP), which was sold in February 2007 to The Blackstone Group for $39 billion in the largest private equity transaction in history at the time.

Mr. Zell serves on the JPMorgan National Advisory Board; the President's Advisory Board at the University of Michigan; the Visitor's Committee at the University of Michigan Law School; and with the combined efforts of the University of Michigan Business School, established the Zell/Lurie Entrepreneurial Center. Mr. Zell has provided continual assistance to Michigan's MBA program has also enhanced the Business School's Polish Studies Program. He was appointed a DeRoy Visiting Professor in Honors at the College of Literature, Science and the Arts at the University of Michigan. He is a long-standing supporter of the University of Pennsylvania Wharton Real Estate Center, and has endowed the Samuel Zell/Robert Lurie Real Estate Center at Wharton. Mr. Zell has also endowed the Northwestern University Center for Risk Management.

A native Chicagoan, Mr. Zell holds a bachelor's degree and a J.D. from the University of Michigan. He began his career in real estate as an undergraduate at the University by managing apartment buildings throughout Southeast Michigan. Mr. Zell is an avid skier, racquetball player and enjoys riding motorcycles. He is a frequent contributor of articles to various publications, and is often heard as a keynote speaker throughout the United States and Europe.

Robert D. Stock, PhD

Director Capital Markets, Spruce Private Investors, LLC

Featured Speaker

Fat Tail Risk Strategies for Single Family Offices

3:30pm - 4:15pm

Contact

John Bailey

Founder & CEO

Spruce Private Investors
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As Director of Capital Markets, Robert focuses on risk management, portfolio construction, and capital markets forecasting for Spruce clients. Earning his PhD in Physics from Carnegie Mellon University and his AB in Physics from Princeton University, Robert has spent his career dedicated to the application of scientific computing and numerical methods to the solution of practical problems.

Robert maintains an aggressive and proactive risk management process utilizing sophisticated algorithms in his forecasting models to identify tail risk within Spruce's portfolios as well as with potential investment opportunities. He does so by using higher moments beyond normal volatility to describe the probability distribution of returns. He also uses his applied physics experience to filter noisy financial data and identify the relevant parameters in the development of his robust models to minimize risk while maximizing opportunity.

Prior to joining Spruce, Robert spent nine years as a researcher in the Directed Energy Group at MIT's Lincoln Laboratory, a leading defense-related national lab, performing simulations and optimizations of high energy laser systems for missile defense.

About Spruce Private Investors, LLC

Spruce Private Investors, LLC, is an award-winning wealth management firm that serves as a Chief Investment Officer for 45 family offices, foundations and endowments. Spruce advises approximately $3.2 billion in broadly diversified portfolios, including six traditional investment portfolios of global equities, fixed income, high income, liquid absolute return, currencies and commodities, and nine alternative investment portfolios featuring hedge funds, private equity, real estate and oil & gas. Since 2001, Spruce has helped families and investors benefit from a broad and sophisticated array of global investment opportunities, aggressive risk management, and objective investment advice.

Jeff Applegate

Chief Investment Officer, Morgan Stanley Smith Barney

Featured Speaker

Financial Market Outlook

4:15pm - 5:00pm

Contact

Jonathan H. Evans
Senior Vice President
Family Wealth Director

David Donovan, CFP
Senior Vice President
Family Wealth Director

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Jeff Applegate is the chief investment officer of Morgan Stanley Smith Barney, responsible for strategic and tactical asset allocation advice to clients. He leads the investment strategy team and chairs the Global Investment Committee.

Previously, Mr. Applegate was the chief investment officer at Citigroup Global Wealth Management and, before that, Franklin Templeton. Earlier in his career, he was chief investment strategist for Lehman Brothers and Credit Suisse. Mr. Applegate has also been a senior invest.

ment advisor on both the sell side and the buy side at institutions such as Shearson Lehman Hutton, E.F. Hutton and Smith Barney. He began his career as an analyst with H.C. Wainright in 1974.

Mr. Applegate earned a B.A. in international studies from American University and a B. Litt. in politics from Oxford University. He is on the Morgan Stanley Retirement Plan Committee and the Morgan Stanley Smith Barney Management Committee. He is also a member of the New York Society of Security Analysts and the CFA Institute.

Joseph P. Quinlan

Managing Director & Chief Market Strategist
U. S. Trust, Bank of America Private Wealth Management

Featured Speaker

Financial Market Outlook

4:15pm - 5:00pm

Contact
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Joseph Quinlan is Managing Director and Chief Market Strategist at U. S. Trust, Bank of America Private Wealth Management . In this role, Joe oversees the development and implementation of investment strategies and solutions for the various channels of Bank of America's Global Wealth & Investment Management division for U.S. Trust. In this role, Joe provides economic and market insights and executes the firm's overall investment strategy, both domestically and globally which is frequently cited in such media venues as Barron's, The Wall Street Journal, The New York Times and the Financial Times.

With nearly 20 years of financial services experience, Mr. Quinlan most recently served as a senior global economist/strategist for Morgan Stanley. Mr. Quinlan started his career with Merrill Lynch.

Mr. Quinlan lectures on finance and global economics at New York University, where he has been a faculty member since 1992. He regularly lectures at various universities around the world. In 1998, he was nominated as an Eisenhower Fellow. Presently, he is a Senior Fellow at the Paul H. Nitze School of Advanced International Studies of Johns Hopkins University, Washington D.C., a Senior Fellow at the German Marshal Fund in Brussels, Belgium, and a Fellow on U.S.-Asian Affairs at the Pacific Council on International Policy in Los Angeles, California.

In 2006, the American Chamber of Commerce to the European Union awarded Mr. Quinlan the 2006 Transatlantic Business Award for his research on U.S.-Europe economic ties. In 2007, he was a recipient of the European-American Business Council Leadership award for his research on the transatlantic partnership and global economy.

Mr. Quinlan regularly debriefs policy makers and legislators on Capitol Hill on global trade and economic issues. He has testified before the European Parliament. He has served as a consultant to the U.S. Department of State and presently serves as the U.S. representative (Economic Policy Committee) to the Organisation for Economic Co-operation and Development in Paris, France for the U.S. Council for International Business. He is also a board member of Fordham University's Graduate School of Arts and Science and serves on Fordham University's President Council.

He is the author, co-author, or contributor to eleven books. He has published more than 125 articles on economics, trade and finance that have appeared in such venues as Foreign Affairs, the Financial Times, The Wall Street Journal and Barron's. He regularly appears on CNBC, as well as Bloomberg television, PBS and other media venues.

He has earned his B.A. in Political Science/International Affairs from Niagara University and M.A. in International Political Economics and Development from Fordham University.

Alan C. "Ace" Greenberg

Vice Chairman Emeritus, J.P. Morgan

Closing Keynote

5:00pm - 5:45pm

Alan C. ("Ace") Greenberg is Vice Chairman Emeritus of J.P. Morgan, focusing primarily on Private Client Services.

Mr. Greenberg had been affiliated with Bear Stearns for more than 59 years, joining the firm in 1949 as a clerk and subsequently became a trader. He was made a partner in 1958 and was named Chief Executive Officer in 1978. In 1985, when the firm went public, he was named Chairman of the Board as well. He relinquished his title as Chief Executive Officer in 1993 and retired as Chairman in June 2001. He then held the title of Chairman of the Executive Committee until 2008 when Bear Stearns and JPMorgan merged.

During his long career, Mr. Greenberg has built a reputation as one of Wall Street's most successful traders and industry visionaries. Under his leadership, Bear Stearns had become one of the financial industry's top investment firms.

Mr. Greenberg's accomplishments extend well beyond his professional career. An avid sportsman, professional-level magician and dog trainer, he also won a national bridge championship. He was knighted by the Queen of Denmark (1984), was inducted into the Oklahoma Hall of Fame (1995) and became a member of the Horatio Alger Association of Distinguished Americans (1997).

He is a graduate of the University of Missouri.

Greg Coules

Managing Director, Co-Head Family Office & Endowment Practice,
Hunter Advisors

Closing Session

Discussion leader

5:00pm - 5:45pm

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Greg Coules
Hunter Advisors

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Greg Coules, Managing Director, Co-Head Family Office & Endowment Practice, Hunter Advisors

Greg Coules joined Hunter Advisors as a Managing Director to co-lead recruiting for the Alternatives business as well as to lead the Family Office and Endowment practice. Most recently, he was an Event Driven Portfolio Manager at Brencourt Advisors, a multi-billion dollar, multi-strategy hedge fund. Previously, Greg was at Metropolitan Capital Advisors where he was Director of Research for the $400 Million event driven fund. Prior to Metropolitan, Greg was a VP at JP Morgan, where he was a senior distressed bank debt analyst. Prior to JP Morgan he was a VP at Morgan Stanley as the Broadcasting, Printing and Publishing Analyst within the High Yield division. At Morgan Stanley, Greg led the Broadcasting, Printing and Publishing team, which was awarded the #1 ranking in 2002 by Institutional Investor Magazine, and he was named the Best Up and Coming Analyst that same year. Greg began his career as an attorney at Skadden, Arps, Slate, Meagher and Flom.

Greg received an MBA from Harvard Business School, a JD from the University of Chicago Law School, and a BA in Economics with honors from the University of Chicago. Greg is a member of the Visiting Committee of the University of Chicago Law School, is on the Board of Directors of The Family Office Association and is a Senior Advisor to a Private Family Foundation focusing on major projects throughout the U.S. and Israel.

To learn more about FOA contact:

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FAMILY OFFICE
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