

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

FOA Spring Global Summit
Expert Biographies



BIOGRAPHIES

FOA Spring Global Summit: **Expert Biographies**

François M. de Visscher
Founder & President,
de Visscher & Co.

Fatima Dickey
Managing Director,
Portfolio Manager
U.S. Trust, Bank of America
Private Wealth Management

Wilbur L. Ross, Jr.
Chairman and Chief Executive
Officer, WL Ross & Co. LLC and
Chairman, Invesco Private Capital

Morris W. Offit
Chairman, Offit Capital Advisors
and Chairman of the firm's
Investment Committee

James H. "Jamie" McLaughlin
CEO, J. H. McLaughlin, LLC

Dev Chodry
Portfolio Manager,
Old Bellows Partners LP,
Scoggin Worldwide Fund

Jame Donath
Portfolio Manager,
Karsch Global Credit LLC

David Schiff
Partner, Perella Weinberg Partners &
PM of the Perella Weinberg Partners
Asset Based Value Strategy

Mac Nease, III
President, Nease, Lagana, Eden
& Culley, Inc.

Kate Welling
Founder, Welling@Weeden

Michael van Biema
Founder, CIO & Chief Investment
Officer, van Biema Value Partners

David Edington
Managing Director & Chief
Investment Officer, Rimrock
Capital Partners

Stephen Rogers
Co-founder, RogersCasey

Don Rogers
Founder & Managing Partner,
Stride Capital

Maria Elena Lagomasino
CEO, Genspring

Maxwell Bruce Drever
Family Principal

Gordon Jones
Managing Partner, President,
Timbervest, LLC

Lorenz Reibling
Chairman & Co-Founder,
Taurus Investment Holdings

Andrew Feldstein
Co-founder, CEO and Chief
Investment Officer,
Blue Mountain Capital Management

Katherine Lorenz
President of the Cynthia and
George Mitchell Foundation

Melanie Schnoll Begun
Managing Director and Head of
Philanthropic Services, Morgan
Stanley Smith Barney

Silda Wall Spitzer
Managing Director,
Metropolitan Capital Advisors

Karen Finerman
Co-Founder and Chief Executive
Officer, Metropolitan Capital Advisor

Lawrence E. Golub
President, Golub Capital

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



François M. de Visscher

Founder & President, de Visscher & Co

Summit Chair

Contact

de Visscher & Co.

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www.devisscher.com

François M. de Visscher, A native of Belgium, has been an active advisor to business owning families for over 25 years, mostly in the United States, Canada, Europe, the Middle East and Latin America. In 1990, he founded de Visscher & Co., one of the world's leading independent financial consulting and investment banking firms for family and closely-held companies. Over the last 20 years, he and his team have advised over 300 family companies and family offices worldwide on issues of liquidity of shareholders or capital needs of their business. Prior to opening his own firm he was a partner at Smith Barney, where he founded and ran Wall Street's first Family Business Group. In 1998, Mr. de Visscher founded "Family Capital Growth Partners", a private equity fund focused on making equity investments in family-owned and closely held companies.

Mr. de Visscher is a director and shareholder of his own family's global enterprise, N.V. Bekaert S.A. Headquartered in Belgium, Bekaert was founded by his great-grandfather in 1880. Today, the Bekaert Group has sales of \$6.0 Billion in over 120 countries as a global market leader in drawn steel wire products and applications.

Mr. de Visscher is a partner, investor or director of several private corporations including Olympia Chimneys, Epic Brands in the U.K., Ambridge Corp. in Colombia, Passport Brands, J.H. Whitney Pan Asian Fund and Park Avenue Equity in the U.S. He holds the title of Honorary Consul of Belgium in the United States and serves as Chairman of The Society of Friends of Belgium in America.

Among his contributions to the field, Mr. de Visscher served as a director and president of the Family Firm Institute, (Boston, MA). He is the current Chairman of the European Family Office Conference, and a contributor to many publications, including The Wall Street Journal, LA Times, NY Times and many others. He is a full-time contributing editor of Family Business Magazine. In 2003, Mr. de Visscher received the Richard Beckhard Practice Award from the Family Firm Institute in recognition of his many contributions to the field of family businesses.

Mr. de Visscher is a Certified Public Accountant and a member of the American Institute of CPA's. Mr. de Visscher holds a Bachelor of Economics honors degree from Université Catholique de Louvain (Belgium) and MBA from Rutgers University.

de Visscher & Co.

Serving as a trusted financial advisor to its family business clients, de Visscher & Co. designs, evaluates and implements customized financial solutions to the capital, liquidity and wealth planning needs of family owned and closely held businesses and Single Family Offices. In doing so, we assist our clients in continuously balancing the liquidity needs of shareholders, the capital needs of the business and the governance and stewardship objectives of the family. We understand the complexity of issues facing business owning families, because we address those challenges everyday as advisors to family businesses, as owners and as investors.

Fatima Dickey

Managing Director, Portfolio Manager U.S. Trust,
Bank of America Private Wealth Management

Pre-Summit Special Speaker

Global Opportunities –
Investing Globally in
a Competitive
World

7:45am - 8:30am

Contact

Fatima Dickey

Phone: 212-852-3691

fatima.dickey@ustrust.com

Fatima Dickey is a managing director and co-manager of the Global Opportunities Core Strategy at U.S. Trust. Ms. Dickey joined U.S. Trust in 2001 and became the co-manager of the Excelsior Equity Opportunities Fund and the Equity Core Managed Strategy, managing client assets through separately managed accounts, a mutual fund, and a common trust fund. Following Bank of America's acquisition of U.S. Trust, Ms. Dickey moved to Columbia Management Group where she continued to manage the strategies until returning to U.S. Trust in 2009. Prior to joining U.S. Trust, Ms. Dickey was an investment banking analyst in the private placements group of A.G. Edwards & Sons in St. Louis and an equity analyst at Fidelity Investments in London.

Ms. Dickey graduated, summa cum laude, from Washington University, St. Louis with degrees in finance and German studies. She earned a M.B.A. degree from the Wharton School of the University of Pennsylvania.

U.S. Trust, Bank of America Private Wealth Management

U.S. Trust is part of the Global Wealth & Investment Management (GWIM) unit of Bank of America, a global leader in wealth management, private banking and retail brokerage. Responsible for \$308 billion in client assets, the firm employs more than 4,000 professionals and maintains 140 offices in 32 states. In 2009, Bank of America was ranked the No. 1 wealth manager in the United States for high- and ultra-high net worth client segment by Barron's Magazine. The same year, the bank also ranked No. 1 in Barron's annual ranking of the Top 1000 Financial Advisors.

Wilbur L. Ross, Jr.

Chairman and Chief Executive Officer, WL Ross & Co. LLC and
Chairman, Invesco Private Capital

Morning Keynote

9:15am - 10:00am

Contact

Tracy Wei

WL Ross & Co. LLC

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twei@wloss.com

Mr. Ross, CEO of WL Ross & Co. LLC, may be one of the best known private equity investors in the U.S. His private equity funds bought Bethlehem Steel and several other bankrupt producers and revitalized them into the largest U.S. producer before merging them into Mittal Steel for \$4.5 billion. Mr. Ross remains a Director of what is now ArcelorMittal, the world's largest steel company. He also created and chairs International Coal Group; International Textile Group, the most global American company in that industry; and International Auto Components Group, a \$4.5 billion producer of instrument panels and other interior components, operating in 17 countries; Compagnie Europeenne de Wagons Sarl, the largest rail car leasing company in Europe, and American Home Mortgage Servicing Inc., the second largest servicer of subprime mortgages. He is a member of the Boards of Assured Guaranty, BankUnited and Greenbrier Companies, all NYSE-listed, of PLASCAR listed in Brazil, and Sun Bancorp which is traded over the counter.

Mr. Ross was Executive Managing Director of Rothschild Inc. for 24 years before acquiring that firm's private equity partnerships in 2000. He is a Board Member of Yale University School of Management, Partnership for New York City, Palm Beach Civic Association, Business Roundtable, Harvard Business School Club of New York, The Committee on Capital Markets Regulation, The Harvard University Committee on University Resources, BritishAmerican Business, The Blenheim American Foundation, Palm Beach Preservation Foundation and the Chairman's Council of the U.S./India Business Council. He is Chairman of the Japan Society and Chairman of Palm Beach Firefighters Retirement Fund. President Kim Dae Jung awarded him a medal for his assistance in Korea's financial crisis, President Clinton appointed him to the Board of the U.S.-Russia Investment Fund and he served as Privatization Advisor to New York City Mayor Rudy Giuliani. China Institute has presented him with its Blue Cloud Award. Mr. Ross formerly served as Chairman of the Smithsonian Institution National Board.

Mr. Ross is a graduate of Yale University and of Harvard Business School (with distinction). He is the only person elected both to the Private Equity Hall of Fame and the Turnaround Management Association Hall of Fame.

WL Ross & Co. LLC

WL Ross & Co. is acknowledged as one of the world's leading turnaround groups. We invest in and restructure financially distressed companies and look to create new, world-class enterprises. Our extensive knowledge, insight and longevity offer a distinct advantage when assessing and cultivating new investment opportunities, particularly in niche markets.

Our experience in distressed securities dates back to 1976 when Wilbur L. Ross Jr. led the worldwide bankruptcy advisory practice at Rothschild Inc. For over a decade, his team assisted in restructuring more than \$200 billion in liabilities in major corporate restructurings and bankruptcies in North America.

In 2000, Mr. Ross established his own company with \$440 million in investor money and a staff that includes our entire current investment committee. We joined Invesco Ltd. in 2006, enhancing their strong institutional platform and global capabilities.

Morris W. Offit

Chairman, Offit Capital Advisors and Chairman of the firm's Investment Committee

Interviewer

Morning Keynote

9:15am - 10:00am

Morris W. Offit is Chairman of Offit Capital Advisors and Chairman of the firm's Investment Committee.

From 2002 to June 2007, Mr. Offit was the Co-Chief Executive Officer of Offit Hall Capital Management LLC. Prior to that time he was founder and CEO of OFFITBANK, a wealth management private bank, which merged with Wachovia Bank in 1999.

Mr. Offit began his career in 1960 at Mercantile Safe Deposit and Trust Company in Baltimore in investment research. He joined Salomon Brothers in 1969 and for ten years was a General Partner, establishing the Stock Research Department with subsequent responsibility for fixed income and equity sales.

Mr. Offit received a B.A. from The Johns Hopkins University (1957) and an M.B.A. from the Wharton School of the University of Pennsylvania (1960). He was the recipient of an Honorary Degree of Doctor of Humane Letters from The Johns Hopkins University in 1996. In 1983, he served as Adjunct Professor of Finance at the Columbia Graduate School of Business, lecturing on the secondary capital markets.

Mr. Offit completed a three-year term as President of UJA-Federation of New York in 2007. (Chairman emeritus). His other primary affiliations include serving as a Trustee of The Johns Hopkins University (former Chairman of the Board 1990-1996). He is also a Trustee of the Jewish Museum (former Chairman of the Board 1987-1991) as well as a Trustee of the American Museum of Natural History. In April 2005, Mr. Offit was elected a Director of American International Group, Inc. ("AIG").

James H. “Jamie” McLaughlin

CEO, J.H. McLaughlin & Co., LLC

Moderator

Alpha Generating
Strategies by Leading
Managers

10:00am - 10:45am

Contact

jameshmcl@optonline.net

Mr. McLaughlin has over 20 years of experience in both senior operating roles and client-facing roles in the family office and ultra high net worth industry and has had a varied career history of building organizations. He recently founded a strategy consulting practice for wealth management organizations and family offices.

He was most recently CEO of Geller Family Office Services, the New York multi-family office. He spent the previous five years at Convergent Wealth Advisors (formerly Lydian Wealth Management) as a Managing Director and head of a new office for the firm in the New York market and before that 10 years at Mellon where he was the regional president of Mellon Private Wealth Management’s New York region. Mr. McLaughlin started in the wealth management industry as a financial advisor in the Private Client Group at Sanford C. Bernstein & Co., Inc. in New York.

He has been active in several industry groups as a participant, panelist, speaker, essayist, and blogger. He has been quoted in Barron’s, Business Week, Family Wealth Report, Forbes, FundFire, Crain’s Investment News, Private Asset Management, Reuters and Worth. He is often asked to speak on wealth management issues related to firm-level business economics, client service delivery models, human talent (identification, recruitment and development) and broader themes and trends in the industry.

He serves on the Board of Trustees for the American Foundation for the Blind (AFB) and chairs the AFB’s investment committee. He is a member/partner of The G9, an international association of family offices. He serves on the Subscribers Advisory Committee for PURE (Privileged Underwriters Reciprocal Exchange), a mutual property and casualty company. Mr. McLaughlin was recently President of the Lafayette College Alumni Association and is a member of the college’s Leadership Council.

From 1981 to 1991 Mr. McLaughlin served in both the House and Senate of the Connecticut General Assembly. Along with a tax policy focus, he was the primary sponsor of legislation for the preservation of open space and the “right to die.” In 1985, the Hartford Courant named him one of Connecticut’s “10 Best Legislators.” In 1990, he ran unsuccessfully for Congress in the 5th Congressional District of CT.

Mr. McLaughlin received his Bachelor’s degree in History from Lafayette College and his Master’s in Public Administration from Harvard’s Kennedy School.

Dev Chodry

Portfolio Manager, Old Bellows Partners LP, Scoggin Worldwide Fund

Featured Speaker

Alpha Generating
Strategies by
Leading Managers

10:00am - 10:45am

Contact

**Old Bellows Partners LP,
Scoggin Worldwide Fund Ltd**

David Fried

Phone: 212-583-0710

dfried@scogcap.com

Mr. Chodry is the portfolio manager of Scoggin Worldwide Fund Ltd (“SWF”) which was formed in January 2003. Mr. Chodry joined Scoggin Capital (“SCM”) in 2001 as a distressed analyst and continues to manage the distressed investments for SCM and its affiliated offshore fund which are both event driven multi-strategy funds as well as for SWF. In January 2007, Mr. Chodry formed Old Bellows Partners as a new investment advisor to manage these assets with Craig Efron and Curtis Schenker as his partners. Prior to joining Scoggin Capital, Mr. Chodry was a senior distressed analyst for the ING proprietary trading fund (\$1bn AUM). Mr. Chodry began his career as a financial analyst at Wasserstein Perella & Co. He graduated with a Bachelor of Science degree from the Wharton School of Business at the University of Pennsylvania in 1993.

Old Bellows Partners LP, Scoggin Worldwide Fund Ltd

SWF utilizes a research-intensive approach to identify and exploit opportunities in distressed securities. SWF primarily invests in defaulted/performing bonds, bank debt, trade claims and post reorganization equities. SWF maintains short exposure through cash bonds, CDS in single names/indices and options on equity indexes. SWF is designed to be nimble (current assets \$230mm, capacity \$600mm) with the flexibility to invest in slightly off the run situations as well as large capitalization bankruptcies. Old Bellows has a dedicated team of 3 research analysts who can quickly source and identify attractive opportunities. Old Bellows is supported by the 7 person investment team and back office professionals of SCM. The combined assets of Old Bellows and Scoggin Capital and its affiliated offshore fund is approximately \$1.5bn.

Jame Donath

Portfolio Manager, Karsch Global Credit LLC

Featured Speaker

Alpha Generating Strategies
by Leading Managers

10:00am - 10:45am

Contact

Karsch Global Credit LLC

Phone: 212-284-9817

jame@karschcapital.com

Mr. Donath is the Portfolio Manager at Karsch Global Credit, a global event-driven distressed credit fund he launched in 2009 in partnership with Karsch Capital Management, a \$2.5 billion equity long/short manager. Prior to joining Karsch Global Credit, Mr. Donath was a Managing Director in the distressed investments group at Davidson Kempner Capital Management LLC, a \$14 billion hedge fund, where he started and managed the firm's international credit business. Previously, Mr. Donath was a Financial Analyst in the investment banking division at Goldman, Sachs & Co. and an Associate at Jupiter Partners LLC, a private equity firm. Mr. Donath graduated from Yale University with a B.A. in Economics cum laude and earned his M.B.A. from Harvard Business School.

Karsch Global Credit LLC

Karsch Global Credit is the first credit vehicle launched by Karsch Capital Management, a \$2.5B NY-based equity manager. The KCM Global Credit Opportunities Fund is a global event-driven distressed credit fund. The Fund invests capital in developed countries with established bankruptcy laws, with the expectation that more than 50% of capital will be deployed outside of the United States. Investments are typically senior in the capital structure and predicated on near-term corporate catalysts that are intended to reduce duration and limit volatility of returns. The Fund takes a conservative approach in emphasizing liquidity, capital preservation, and diversification. The Fund has generated gross returns of 13.8% and net returns of 10.2% since it began managing outside capital in September 2010.

David Schiff

Partner, Perella Weinberg Partners & PM of the
Perella Weinberg Partners Asset Based Value Strategy

Featured Speaker

Alpha Generating Strategies
by Leading Managers

10:00am - 10:45am

Contact

Perella Weinberg Partners

Phone: 212-287-3111

perellaweinbergir@pwpartners.com

Mr. Schiff is a Partner at Perella Weinberg Partners and Portfolio Manager of the \$1.0 billion AUM Asset Based Value strategy. The Asset Based Value strategy focuses on asset-based investments, including financial assets (i.e., auto, franchisee, commercial and industrial loans; auto dealer floorplan financing; and royalty streams associated with intangible property) and real assets (i.e., residential and commercial real estate, railcars, ships, energy royalties and related assets, aircraft, large ticket equipment and infrastructure).

Mr. Schiff has more than 17 years of investment experience. He began his career at JP Morgan, where he spent eight years in various positions in its ABS and Securitization Groups. From 2003 to 2005, Mr. Schiff was a Director at Wachovia Securities, where he was responsible for developing various structured principal finance opportunities. Following Wachovia, he was a Managing Director at Amaranth Advisors, where he was responsible for the construction of a non-mortgage Asset-Based Securities Portfolio. In 2007, Mr. Schiff became Chief Executive Officer and Chief Investment Officer at Broadworth Capital for two high net worth families. He joined Perella Weinberg Partners as a Partner and Portfolio Manager of the Asset Based Value strategy in 2008.

The Asset Based Value strategy focuses on capturing attractive opportunities by targeting specific asset classes and investing in performing assets that are believed to be at favorable valuations. These targeted assets generally have a margin of safety due to contractual rights to cash flow and/or hard asset coverage. The strategy employs a dynamic investment approach based on the opportunities and risks it perceives in the market.

Mr. Schiff received a Bachelor of Science degree in Economics, with Distinction, from Cornell University. In connection to the Asset Based Value strategy's investments, Mr. Schiff serves on the Board of Directors of White Pine Trading LLC, Infinity Asset Management II, LLC, and National Franchise Associates, LLC.

Perella Weinberg Partners

Perella Weinberg Partners is a leading independent, client-focused financial services firm that provides corporate advisory and asset management services to clients around the world. Launched in 2006, the Firm is a private limited partnership with approximately 330 employees recruited from a wide variety of leading financial institutions.

With 100 employees, the Firm's asset management activities include a suite of hedge fund strategies, private capital and a multi-manager business. Investments made through these strategies include most major asset classes on a global basis, including equities, fixed income, asset based securities, distressed securities, private investments, and real estate. The global asset management business, including affiliates, has capital commitments and managed assets of over \$7.5 billion.

The Firm has offices in New York, London, Abu Dhabi, Denver, Austin, and San Francisco.

Mac Nease

President, Nease, Lagana, Eden & Culley, Inc.

Featured Speaker

Wealth Transfer Solutions for Single Family Offices

11:00am - 11:45am

Contact

Peter W. Fleming III

Vice President

Nease Lagana Eden & Culley
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Atlanta, GA 30328

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www.nlec.com

Lawton M. Nease, III (Mac) is the President of Nease, Lagana, Eden & Culley, Inc. which was founded in 1988. Mac specializes in planning for estates and businesses in the affluent marketplace, and has been involved in some of the industry's largest and most complex life insurance placements. As an adjunct professor for Georgia State University's Graduate School of Business, he has instructed courses in business insurance, executive benefits, and estate planning. He has also been a special lecturer to the national legal, accounting and estate planning communities for many years and chaired the committee representing the insurance industry in numerous meetings with the US treasury and the IRS to negotiate the split dollar regulations in 2001. He authored the dissertation "Estate and Gift Tax Consequences of Third Party Owned Life Insurance".

Mac has served numerous leadership roles in the insurance industry, including national president of the Advanced Association for Life Underwriting, president of the Atlanta Estate Planning Council, and regional vice president of the Society of Financial Service Professionals. His memberships include the Million Dollar Round Table "Top of the Table" and is an Accredited Estate Planner with the National Association of Estate Planning Councils.

Mac is the Chair of the Board of Trustees for the Georgia Tech Foundation, serves as a director of the Educational Foundation at Georgia State University, and sits on the boards of M Financial Group, M Financial Investment Advisors and M Funds, Inc. Mac also chairs the Product Development Group for M Financial Group.

Mac is a graduate of the Georgia Institute of Technology in business and industrial management. He has an MBA and a PhD in business from Georgia State University and the CLU designation from The American College.

Nease, Lagana, Eden & Culley, Inc.

NLEC is a privately held life insurance advisory firm that specializes in the creative application of life insurance to help solve the unique wealth retention and transfer needs of ultra-high net worth families and family offices. Founded in 1988, the firm manages more than \$10B of life insurance for its clients.

Kate Welling

Founder, Welling@Weeden

Moderator

Leaders in Value Investing
Share Their Wisdom

11:45am - 12:30am

Contact

www.welling.weedenco.com

Kate Welling, for many years Barron's writer and editor, created Welling@Weeden to provide Weeden clients with focused, independent and ahead-of-the pack research, opinion and analysis. Welling@Weeden clients come away from its interviews not with mere lists of buy and sell ideas, but with real — and actionably early — insights into the investment decision-making processes of today's best investors, the issues that challenge them and the devilish details that affect values in portfolios worldwide.

Michael van Biema

Founder, CIO & Chief Investment Officer, van Biema Value Partners

Featured Speaker

Leaders in Value Investing
Share Their Wisdom

11:45am - 12:30pm

Contact

745 Fifth Avenue, 14th Floor
New York, NY 10151
Phone: 212-308-5902

Michael van Biema is the founder of the van Biema Value Partners, LLC. Mr. van Biema was on the faculty of Columbia Business School from 1992 to 2004 where he has taught general corporate finance, capital markets, securities analysis, value investing and entrepreneurial finance in both the regular and executive MBA programs. He has also served as director of a multi-year, multimillion-dollar research project into productivity in the service sector funded by the Alfred P. Sloan Foundation.

He received his B.A. from Princeton University in Electrical Engineering and his Ph.D. from Columbia University Computer Science. Before joining the faculty of Columbia Business School he was involved in several startup ventures.

More recently he has consulted to companies such as: American General, Bell Atlantic, Brambles, CitiGroup, Deutsche Telekom, Gabelli Asset Management, Goldman Sachs, Merck, Salomon Brothers, and Vontobel Asset Management and several private asset management firms.

Mr. van Biema is the author of numerous publications, including an article in the Harvard Business Review entitled "Managing Productivity in the Service Sector" (Summer 1998), and co-author of the book "Value Investing from Graham to Buffett and Beyond" (Wiley, June 2001), and has lectured internationally on value investing.

His greatest awards and achievements are Fiamma age 18, and Tristan age 14.

Dave Edington

Managing Director & Chief Investment Officer,
Rimrock Capital Partners

Featured Speaker

Leaders in Value Investing
Share Their Wisdom

11:45am - 12:30pm

Contact

Michelle Turner

Phone: 949-276-7303

MTurner@rimrockcapital.com

Dave has been involved with the financial markets since 1985. Prior to founding Rimrock Capital Management, he was a Managing Director at Pacific Investment Management Company (PIMCO). While at PIMCO, Dave managed in excess of \$30 billion of assets, earned five-star ratings for both equity and fixed income mutual funds (making him one of two people in history to achieve this) and was twice named to the annual Barron's/Value Line ranking of top U.S. mutual fund managers. Dave also spearheaded PIMCO's leading edge effort in proprietary valuation metrics and risk control systems. Prior to PIMCO, Dave worked as a research analyst for Salomon Brothers Financial Strategies Group, and as a structural design engineer for General Dynamics Space Systems Division. Dave earned a BS from California Polytechnic State University, San Luis Obispo, and holds a Master of Science degree from MIT's Sloan School of Management.

Stephen Rogers

Co-founder, RogersCasey

Luncheon Keynote

Managing Wealth Across
Generations, Lessons
From 50 Years of Asset
Management
Experience

12:30pm - 2:00pm

Steve Rogers is a co-founder and retired Chairman of RogersCasey, one of the country's largest investment consulting companies. The firm was founded in 1976 in response to changes impacting US corporate pension funds. Through Steve's leadership, RogersCasey grew to provide asset allocation, manager evaluation, selection, and program monitoring to more than \$500 billion of assets worldwide.

RogersCasey created investment programs to surpass stated return benchmarks and objectives. The firm was one of the original providers of risk and performance reporting, and developed qualitative and quantitative expertise to identify leading asset managers. This was accomplished before formal asset allocation and style classifications had been developed. In the late 1970's and early 1980's, the firm provided many of today's leading asset management companies' exposure to institutional capital. Steve was instrumental in maintaining the firm's independence and objectivity during these years of enormous expansion in the asset management industry.

Steve directed the purchase of RogersCasey by BARRA, Inc. in 1996. BARRA is a global leader in delivering holdings-based risk management tools to securities firms, asset managers and large sponsors of asset pools. Steve formally retired from BARRA RogersCasey in June, 1999.

Today, Steve continues to be an active investor and serves as an Advisor and Director to several selected managers where his experience continues to be applied.

Steve has an MBA from the Wharton School (1959) and a BA from Brown University (1956). He was a Chartered Financial Analyst (CFA) dating back to 1967 when the distinction was in its formative years.

Don Rogers

Founder & Managing Partner, Stride Capital

Luncheon Keynote

Managing Wealth Across
Generations, Lessons
From 50 Years of Asset
Management
Experience

12:30pm - 2:00pm

Contact

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info@stridecapital.com

Prior to forming Stride, Don was a Partner and founding team member of SkyBridge Capital, which was formed to seed emerging alternative investment partnerships. Don played a significant role in launching SkyBridge's \$330 million first fund and subsequent capital deployment to eight ownership investments in three countries. SkyBridge was formed in partnership with Michael Dell's family office, MSD Capital, an active investor in public securities and private transactions since 1998, managing \$10B.

Don has been an active investor in alternative investment partnerships since 1994 as a co-general partner and co-founder of Rogers Investment Partners. Rogers Investment Partners is a private investment partnership created to invest in managers with an emphasis on emerging and alternative funds and similar considerations as those applied by Stride.

As CEO of CRA Business Strategies Group, Don led a team that advised both established and emerging asset management firms, in aggregate managing hundreds of billions of dollars, on effective management and business building. The Stride opportunity is further informed by RogersCasey, the firm co-founded by his father Steve Rogers in 1976, during similar market circumstances as the 2008 financial crises.

Don graduated from Harvard College in 1992 and received an MBA from Harvard Business School in 1999.

Maria Elena Lagomasino

CEO, Genspring

Interviewer

Managing Wealth Across
Generations, Lessons
From 50 Years of Asset
Management
Experience

12:30pm - 2:00pm

Ms. Maria Elena Lagomasino is the Chief Executive Officer at GenSpring Family Offices, LLC. She was named Chief Executive Officer of the firm in November 2005. Ms. Lagomasino is one of the recognized leaders in the wealth management industry. She was most recently the Chairman and Chief Executive Officer at JP Morgan Private Bank. Ms. Lagomasino began her career in banking at Citibank in 1977. She joined the Chase Manhattan Private Bank in 1983 as Vice President and Team leader for Latin America. Ms. Lagomasino was named head of Chase's worldwide private banking business in 1997. Following the Chase-JP Morgan merger, she was named Chairman and Chief Executive Officer of the JP Morgan Private Bank. Ms. Lagomasino serves on the boards of the Coca-Cola Company and Avon Products, Inc., as well as the Lincoln Center Theater. She is a Trustee of the Synergos Institute and a member of the President's Commission on White House Fellowships. Ms. Lagomasino is also a Trustee on the Board of the National Geographic Society. She is also a member of the Council on Foreign Relations and The Economic Club of New York. In September 2006, Ms. Lagomasino was appointed to serve on the Secretary of State's Advisory Committee on Transformational Diplomacy. In November 2005, she was appointed by President Bush to help lead an effort to secure private sector funds to aid disaster victims in Central America. A graduate of Manhattanville College B.A., Ms. Lagomasino also completed graduate work at both Columbia University M.S. and an M.B.A. degree from Fordham University.

Maxwell Bruce Drever

Family Principal

Moderator

Real Assets Investing for
Single Family Offices

2:00pm - 2:45pm

Contact

www.drever.net

Maxwell Drever's portfolios of investments, held directly or indirectly through Drever Capital Management (DCM) and/or affiliates, have included multifamily, land, industrial, office, and retail properties.

By implementing his team's socially responsible investment strategy through four decades of investment cycles, underperforming apartments and condominiums in growth cities have been redeveloped, on an increasingly cost-effective basis, into class A and B assets.

His Concierge Management Company was one of the earliest and largest buyers during the RTC cycle. Its portfolio consisted of 79 primarily workforce apartment communities with 18,000 units. In October 1997, these assets were merged into Walden Residential Properties, Inc. (NYSE) at a value of \$670 million.

Following a noncompete period, Mr. Drever re-formed Concierge, which recently merged with Crossbeam Capital to form Crossbeam Holdings (approximately 9,000 units). Mr. Drever serves as Chairman Emeritus of the company. His main focus is on acquiring portfolios of challenged assets and/or NPLs.

Mr. Drever and his acquisitions team have long been the "buyer of choice" for lenders/sellers with distressed assets. In December alone, when other buyers were faltering to meet sellers' year-end closing requirements, the team handled six closings

Gordon Jones

Managing Partner, President, Timbervest, LLC

Featured Speaker

Real Assets Investing for
Single Family Offices

2:00pm - 2:45pm

Contact

John McColskey

Director of Business Development
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Mr. Jones is a Managing Partner and the President of Timbervest. He is primarily responsible for the oversight of Timbervest's Crossover Asset investment platform, the structuring of Timbervest's investments, strategic objective planning, management of transactions, operational matters, and general legal oversight and compliance. He is also directly involved the analysis of timberland investments and the marketing of products. During his tenure at Timbervest, Mr. Jones has structured seven commingled funds, assisted with realignment of several client portfolios, and formed a variety of relationships with numerous industry participants. Mr. Jones has extensive experience dealing with commercial and institutional real estate as well as the business and legal aspects of a variety of commercial and private transactions. Prior to joining Timbervest, he was a partner at Parker, Hudson, Rainer & Dobbs LLP where his legal practice was primarily focused on commercial and corporate finance, commercial real estate, mergers and acquisitions, and general corporate and contracts law. Mr. Jones received a Bachelor of Business Administration, with a major in accounting, and a JD degree from the University of Georgia. He is a member of the American Bar Association and the State Bar of Georgia.

Timbervest, LLC

Timbervest, LLC was formed in 1995 to manage timberland, timberland-related investments, and Crossover Assets™ for public and corporate pension plans, corporations, foundations, endowments, and high net worth individuals. As of March 31, 2010, Timbervest manages timberland and Crossover Assets investments in excess of \$1.8 billion. Timbervest's timberland portfolios consist of approximately 825,000 acres of timberland in 20 states. The firm's Crossover Assets portfolios consist of numerous wetland and stream mitigation banks, threatened and endangered species conservation banks and other environmental and ecological focused projects in 14 states. Timbervest has teams of professionals dedicated to each investment platform, as well as in-house legal, accounting and back office expertise. In addition, Timbervest has long standing relationships with some of the most experienced forestry and environmental consultants, various governmental and regulatory agencies, and many industry participants. Timbervest is headquartered in Atlanta, Georgia, and has additional regional offices located in New York, Maine, Alabama, Florida, Georgia, Texas, Tennessee, Vermont and California.

Lorenz Reiblin

Chairman and Co-Founder, Taurus Investment Holdings

Featured Speaker

Real Assets Investing for
Single Family Offices

2:00pm - 2:45pm

Chairman and Co-Founder of Taurus Investment Holdings, LLC, a real estate investment advisor to high-net-worth individuals in Boston. Lorenz is focused on the development and nourishment of international relationships with investors and product sources predominantly in Taurus' non-US related businesses. He is a frequent speaker at real estate conferences, and an advisor to the renowned MIT/CRE Center of Real Estate in Cambridge, MA. Lorenz is a co-founder of Taurus, and has been involved in hundreds of commercial real estate transactions since 1979.

Andrew Feldstein

Co-founder, CEO and Chief Investment Officer,
Blue Mountain Capital Management

Afternoon Keynote

2:45pm - 3:30pm

Contacts

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Andrew Feldstein is a co-founder of BlueMountain and its CEO and Chief Investment Officer. As CEO/CIO, Mr. Feldstein has grown BlueMountain into a leading asset manager focused on the credit markets and equity derivatives markets. BlueMountain manages \$4bn across all of its funds and employs a total of 110+ professionals in NY and London to support its institutionalized and proprietary infrastructure. The firm employs a multi-strategy approach, dynamically reallocating capital to the most compelling relative value opportunities. In addition to its hedge fund assets, BlueMountain manages three CLOs with total AUM of \$1.5bn.

Since founding BlueMountain, Mr. Feldstein has been a leader in the development of credit markets, including participating in CRMPG II and CRMPG III as well as serving on the board of ISDA. Mr. Feldstein is also a co-founder of The Darfur Project, an organization dedicated to providing effective, direct and immediate relief to the people affected by the conflict in Sudan through the support and funding of the financial community.

Prior to co-founding BlueMountain in 2003, Mr. Feldstein was a Managing Director at JP Morgan, where he served in a senior capacity across a variety of derivatives and credit businesses, including Head of Structured Credit, Head of Global Credit Portfolio Management, and Head of High Yield Sales, Trading and Research. Mr. Feldstein holds a J.D. cum laude from Harvard Law School and a B.A. magna cum laude in Economics from Georgetown University.

Katherine Lorenz

President of the Cynthia and George Mitchell Foundation

Featured Speaker Next Generation Philanthropy

3:45pm - 4:30pm

Katherine Lorenz is the Deputy Director for the Institute for Philanthropy (www.instituteforphilanthropy.org), whose mission is to increase effective philanthropy in the UK and internationally. Through offices in London and New York, the Institute for Philanthropy provides education and advisory services to donors, builds philanthropy networks in the UK and around the world, and works to raise the awareness and understanding of philanthropy.

Prior to her work with the Institute for Philanthropy, Ms. Lorenz lived and worked in Oaxaca, Mexico for nearly six years where she co-founded Puente a la Salud Comunitaria (www.puentemexico.org), a non-profit organization working to eradicate malnutrition and advance food sovereignty in rural Oaxaca through the integration of amaranth into the local diet. She continues to be highly involved with Puente's work as an active board member.

Before founding Puente, she spent two summers living and working in rural, poor communities in Latin America with the volunteer program Amigos de las Américas and now serves on their Program Committee and is a trustee of the Foundation for Amigos de las Americas. Additionally, she was recently elected President of the Cynthia and George Mitchell Foundation, and she serves on the Boards of Directors of the Endowment for Regional Sustainability Science, Resource Generation, and the Amaranth Institute. Along with her family, Ms. Lorenz is a member of the Global Philanthropists Circle (through the Synergos Institute) and is an active participant in the GPC Next Generation subgroup. Ms. Lorenz holds a B.A. in Economics and Spanish from Davidson College.

Melanie Schnoll Begun

Managing Director and Head of Philanthropic Services,
Morgan Stanley Smith Barney

Interviewer

Next Generation Philanthropy

3:45pm - 4:30pm

Contacts

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Melanie Schnoll Begun is a Managing Director and Head of Morgan Stanley Smith Barney's Philanthropic Services. Melanie has served as a philanthropic counselor to families, foundations and family offices for over 17 years. She works with the firm's ultra-high-net-worth clients to develop areas of focus for their philanthropy; engage multiple generations in their foundation's governance, programming and evaluation; help clients to design customized domestic and international grant-making portfolios and gift agreements; facilitate giving circles and retreats; and coordinate with clients' tax and legal professionals on the formation of tax-exempt nonprofit organizations as well as their dissolution or merger.

Melanie joined Smith Barney in 1997 as Associate Estate Planning Counsel in the Estate & Trust Services group. Prior to Smith Barney, Melanie was an estate planning attorney in a New York City law firm.

Melanie is the Vice President of Morgan Stanley Smith Barney's Global Impact Funding Trust, Inc., the nonprofit organization sponsoring the firm's donor-advised fund, and is a Board Officer and Board Member of the Juvenile Diabetes Research Foundation and the Partnership for Philanthropic Planning (formerly the National Committee for Planned Giving). She is also on the advisory boards of Girls, Inc., and Grameen America, a non-profit microfinance organization whose mission is to help entrepreneurial individuals, especially women, build credit and defeat poverty. She has published articles on various tax, estate and charitable planning strategies in *Trusts & Estates* magazine, *Tax Notes Today*, *Exempt Organization Report* and various other trade journals, as well as appeared in publications such as the *New York Times*, the *Wall Street Journal*, and *The Chronicle of Philanthropy*.

Silda Wall Spitzer

Managing Director, Metropolitan Capital Advisors

Moderator

4:30pm - 5:15pm

Silda Wall Spitzer joined the Metropolitan team in October 2008 for business development, strategic positioning and idea generation. She began her legal career with Skadden, Arps, Slate, Meagher & Flom, specializing in mergers, acquisitions and corporate finance from 1984-1987 and then joined The Chase Manhattan Bank from 1987 until 1994 as a member of its International Legal Group. In 1996, she founded Children for Children, a not-for-profit engaging young people from all backgrounds to Grow Involved through volunteering and service learning. Silda was honored to serve as First Lady of the State of New York in 2007-08. Silda also sits on other boards and is involved with issues involving Green/Sustainability, youth service and women's leadership. She is a graduate of Harvard Law School and has a B.A. from Meredith College.

Karen Finerman

Co-Founder and Chief Executive Officer, Metropolitan Capital Advisor

Closing Keynote

4:30pm - 5:15pm

Contacts

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Dora Vardis

Chief Operating Officer
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University of Pennsylvania's Wharton School, B.S., Economics with a concentration in Finance.

Prior to co-founding MCA in June 1992, Ms. Finerman was the Lead Research Analyst for the Risk Arbitrage department at DLJ Securities Corp.

Karen serves on the Board of The Michael J. Fox Foundation for Parkinson's Research and is also a Trustee of Montefiore Medical Center, sitting on their Investment Committee. Karen appears as a permanent member on CNBC's Fast Money, one of the most watched business programs in America.

Lawrence Golub

President, Golub Capital

Closing Keynote

4:30pm - 5:15pm

Contacts

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Lawrence Golub

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Golub Capital manages about \$4.5 billion of capital on behalf of private and institutional investors. The firm is the leading middle market direct lender to leveraged companies in the U.S. (ranked by Reuters LPC in the top 3 for three years running in middle market LBO lending). Golub Capital was named “Middle Market Lender of the Year” by Buyouts Magazine for two years in a row in 2009 and 2010. The firm has also been honored as “Debt Financing Agent of the Year” by M&A Advisor in 2010; “Mezzanine Financing Agent of the Year” by M&A Advisor in 2009; “Financing Firm of the Year” by M&A Advisor in 2008; and “M&A Lender of the Year” for 2008 by the Association for Corporate Growth’s monthly magazine, Mergers and Acquisitions.

Mr. Golub founded Golub Capital in 1994. Previously, Mr. Golub was a Managing Director at Bankers Trust Company. Prior to that, he was a Managing Director of Wasserstein Perella, where he established the firm’s capital markets group and debt restructuring practice. Mr. Golub started his career at Allen & Company Incorporated, where he engaged in principal investing, mergers and acquisitions advisory engagements and corporate finance transactions.

Mr. Golub, a former White House Fellow, is active in charitable and civic organizations. He is one of three private Members of the Financial Control Board of the State of New York, Treasurer of the White House Fellows Foundation, President of the Harvard University JD-MBA Alumni Association and a member of the Harvard University Committee on University Resources. He served for over fifteen years as a trustee of Montefiore Medical Center, the university hospital of the Albert Einstein Medical School. He was also chairman of Mosholu Preservation Corporation, a developer and manager of low income housing in the Bronx. He also served for six years as a trustee of Horace Mann School and for five years on the Harvard University Committee for Science and Engineering.

Mr. Golub earned his AB degree magna cum laude in economics from Harvard College. He received an MBA from Harvard Business School, where he was selected as a Baker Scholar, and a JD from Harvard Law School, where he served as an editor of the Harvard Law Review.

To learn more about FOA contact:

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