



THE FAMILY WEALTH ALLIANCE  
WE CONNECT YOU<sup>SM</sup>

# 2022 Alliance Fall Forum Rediscover

October 18-20 | The Union League Club of Chicago



# Thank you to our Strategic Partner Co-Hosts:

## PLATINUM



## PREMIER



## EXECUTIVE



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# AGENDA AT-A-GLANCE

*All sessions and meals will take place in the Lincoln Ballroom, 6<sup>th</sup> floor unless otherwise noted.*

## **Tuesday, October 18**

- 4:00pm Registration opens  
*President's Room Foyer, 2<sup>nd</sup> Floor*
- 4:30pm Going Places: An Immersive Networking Reception  
*President's Room, 2<sup>nd</sup> floor*
- 6:30pm Young Professionals Award Dinner  
*Lincoln Ballroom, 6<sup>th</sup> floor*

## **Wednesday, October 19**

- 8:00am Registration & Breakfast
- 9:00am Opening Remarks
- 9:25am Alliance Outlook and Research: Talent & Compensation in Family Wealth Findings
- 10:15am Break
- 10:30am Hearing Their Voice: A Panel of Young Professionals
- 11:20am Talent & Compensation: A Reality Check
- 12:15pm Networking Lunch
- 1:45pm Alliance Updates
- 2:05pm Finding Purpose: Going Beyond 'Helping the Rich Get Richer'
- 2:55pm Break
- 3:10pm Managing a Bespoke Investment Experience
- 4:00pm Peer-to-Peer Perspectives
- 5:00pm Day One Sessions Conclude/Afternoon Break
- 6:00 pm Dine-Arounds (*by invitation only*)  
*If attending, dinner assignments are located on the back of your name badge*
- 8:00pm Desserts & Cordials  
*Heritage Room, 2<sup>nd</sup> floor, all attendees are invited*

## **Thursday, October 20**

- 8:00am Breakfast
- 9:00am Welcome Remarks
- 9:10am Leadership Succession: A Fireside Chat about Cultivating Enduring Value
- 10:00am Break
- 10:15am One Size Does Not Fit All: Diversifying Your Client Experience
- 11:05am The Next Frontier: The Intersection of Wellbeing & Wealth
- 11:55am Closing Remarks
- 12:00pm Networking Lunch
- 1:00pm Conference Concludes

# WELCOME

Our world has changed. The motivations, interests, and expectations of both our clients and employees have evolved – but are we keeping up with them? We believe now is the time to pause and **Rediscover** who we serve, how we serve them, and most importantly, why we serve them.

Alliance Events are known for a welcoming and collegial atmosphere unlike anything else in the industry. Our events are intimate and purposeful – no large auditoriums or exhibition halls. We take enormous pride in our thoughtfully curated event experience focused on making meaningful connections.

[We look forward to connecting with you!](#)

**Thank you, Co-Chairs,** for your time and insights helping us plan the 2022 Alliance Fall Forum:



**Kristen Bauer**  
Laird Norton  
Wealth  
Management



**Lynne Born**  
Aspiriant



**Scott Savage**  
SJS  
Investment  
Services



**Randy Webb**  
Brown  
Advisory

# AGENDA

Tuesday, October 18

4:00pm **Registration opens**

*Presidents Room Foyer, 2nd Floor Foyer*

4:30pm **Going Places: An Immersive Networking Reception**

*Lincoln Ballroom, 6th floor*

6:30pm **Young Professionals Award Dinner**

*sponsored by Haute Explore*

Wednesday, October 19

8:00am **Registration & Breakfast**

*Lincoln Ballroom, 6th Floor*

9:00am **Opening Remarks**

*Rachel Hyman, President, The Family Wealth Alliance*

9:25am **Alliance Outlook and Research: Talent & Compensation in Family Wealth Findings**

*Tom Livergood, Founder & CEO, The Family Wealth Alliance*

*This session qualifies participants for 1 CPE credit.*

*Field of Study: Personnel/Human Resources*

*Learning Objectives: Program participants who attend this session will hear data and insights for benchmarking against peers in the industry ultimately informing them on running a sustainable and competitive family office.*

10:15am **Break**

10:30am **Hearing Their Voice: A Panel of Young Professionals**

Coming off the heels of our 2022 Young Professional Awards, in this opening session we will hear directly from rising stars in our industry: why they are staying in their current roles, what keeps them motivated, what they value, how they find purpose at work, and what they plan to do as rising leaders to attract and retain future talent on their teams.

**Speakers**

- Victor Abiamiri, Partner, Portfolio Manager, Brown Advisory
- Lauren Wood, Wealth Manager, Shareholder, Wetherby Asset Management
- Michael Clark, Chief Operating Officer, The Family Office at Synovus
- *Moderated by* Abigail George, Managing Director, Family Office Executive, CIBC Private Wealth

*This session qualifies participants for 1 CPE credit.*

*Field of Study: Personnel/Human Resources*

*Learning Objectives: Program participants who attend this session will hear from rising stars in the industry on what motivates employees.*

11:20am **Talent & Compensation: A Reality Check**

After hearing the newly released data from The Family Wealth Alliance *2022 Talent and Compensation Study*, a panel of executives will discuss the reality of how these trends play out in daily business operations. The latest trends on increasing compensation and benefits have strained business operations. At the same time, market volatility has had a direct impact on the frequency of client connections and, in some cases, the fees they have paid this year. What does this mean for the sustainability of the firm? In this session, we will discuss implications and fresh ideas for managing these significant changes.

**Speakers:**

- [Rusdi Sumner, Chief Operating Officer, Market Street Trust Company](#)
- [Rory S. Melick, Partner, Head of Human Capital Management, Lord Abbett](#)
- [Scott Horn, President, TFO Phoenix](#)
- *Moderated by* [Tim Spidel, Managing Partner, Spidel Burnfin](#)

*This session qualifies participants for 1 CPE credit.*

*Field of Study: Personnel/Human Resources*

*Learning Objectives: Program participants who attend this session will hear from executives navigating the employee retention challenges in the industry.*

12:15am **Networking Lunch**

Attendees are encouraged to network during lunch, find people on your dance card, and visit the resource table.

1:45pm **Alliance Updates**

[Rachel Hyman, President, The Family Wealth Alliance](#)

2:05pm **Finding Purpose: Going Beyond 'Helping the Rich Get Richer'**

[Brian Portnoy, CEO, Shaping Wealth](#)

In this interactive session, we will explore how to find purpose at work. Leaders of family offices are frequently reporting their young professionals do not feel purpose or connection to why they are working in family wealth. The session will be led by Brian Portnoy, Ph.D, CFA, one of the world's leading experts on the psychology of money. In his bestselling book, *The Geometry of Wealth*, Dr. Portnoy defines true wealth as "funded contentment," or the ability to underwrite a meaningful life. He will guide attendees to understand the dimensions of funded contentment and how they can be applied to the search for purpose and fulfillment, both in our personal lives and at work.

*This session qualifies participants for 1 CPE credit.*

*Field of Study: Personal Development*

*Learning Objectives: Program participants who attend this session will learn best practices for motivating employees and helping them discover purpose at work.*

2:55pm **Break**

3:10pm **Managing a Bespoke Investment Experience**

As the demographics of our clients evolve, so do their preferences and expectations. Couple that with market volatility and Chief Investment Officers have their hands full. It is becoming increasingly challenging for investors to balance the demands of today's private clients. Client sizes and needs vary significantly, as do implementation approaches to customized investment. Join us for this discussion on the difficulties of managing portfolios and investment demands from today's private clients.

Speakers:

- Jim Foster, Managing Director, Greycourt & Co., Inc.
- Rick Pitcairn, Chief Investment Officer, Pitcairn
- Maria Chrin, Founder & Managing Partner, Circle Wealth Management
- Moderated by Seiji Nishimura, Head of US Intermediaries, Pictet Asset Management

*This session qualifies participants for 1 CPE and 1 CFP credit.*

*Field of Study: Finance (CPE), Investment Planning (CFP)*

*Learning Objectives: In this session, attendees will hear an overview of investment and allocation strategies, advantages and disadvantages of incorporating alternative asset classes, and managing a bespoke investment experience for all private clients.*

4:00pm **Peer-to-Peer Perspectives**

Peer-to-Peer Perspectives are peer group conversations that allow attendees to dig into the questions and issues that matter most to them. Join your assigned small group of peers to share insights and explore new possibilities. Table assignments are located on the back of your name badge.

5:00pm **Day One Sessions Conclude/Afternoon Break**

6:00 pm **Dine-Arounds** *(by invitation only)*

*Various locations. Please refer to back of name badge for dinner assignment.*

Family wealth executives attend private, pre-assigned dinners hosted by Alliance Strategic Partners. Dinner assignments are located on the back of your name badge. Attendees not assigned to dinner are welcome to have dinner on your own, but join us back at The Union League Club for dessert!

8:00pm **Desserts & Cordials**

*Heritage Room, 2nd Floor, all attendees are invited*

All attendees are welcome to join us for coffee, dessert, and cordials after dinner until 10pm.

Thursday, October 20

8:00am **Breakfast**  
*Lincoln Ballroom, 6th Floor*

9:00am **Welcome Remarks**  
[Rachel Hyman, President, The Family Wealth Alliance](#)

9:10am **Leadership Succession: A Fireside Chat about Cultivating Enduring Value**  
We've heard from our young professionals and executives on the current talent market and its impact on firm sustainability. While the operational demands of running a family office can be all-consuming, it is vital to spend time assessing your succession plan.

Neil Kreuzberger and Bruce Benesh have been on the front lines of family office talent, compensation, and succession planning for decades. They've witnessed and navigated the talent landscape while helping hundreds of executives create a sustainable succession plan for their businesses. Now on the stage together, they will share what they've seen, learned, and anticipate the future talent market will hold.

Speakers:

- [Neil Kreuzberger, President & Founder, Kreuzberger Associates](#)
- [Bruce Benesh, Founder, Benesh Consulting Group](#)

*This session qualifies participants for 1 CPE credit.*

*Field of Study: Business Management & Organization*

*Learning Objectives: Program participants who attend this session will learn about the importance of succession planning and best practices for doing it.*

10:00am **Break**

10:15am **One Size Does Not Fit All: Diversifying Your Client Experience**  
The demographics of our clients are shifting dramatically across many facets, including race, gender, and age. Melinda Hightower (Mel) has led the charge at UBS to pivot their offering to meet the needs of their diverse client base. After conducting over 3,000 interviews with affluent diverse clients, Mel and her team have created a roadmap to serving the next generation. In an interview led by Kristen Bauer, Mel will share findings from her research, how UBS has adjusted their client experience, and what is next.

Speakers:

- [Melinda Hightower, Managing Director, Head of Multicultural Strategic Client Segments, UBS](#)
- [Interviewed by Kristen Bauer, CEO, Laird Norton Wealth Management](#)

*This session qualifies participants for 1 CPE & 1 CFP credit.*

*Field of Study: Behavioral Ethics (CPE), Psychology of Financial Planning (CFP)*

*Learning Objectives: Attendees will learn how a client's values, including cultural and religious values and attitudes may impact their goals and the financial planning process.*

11:05am **The Next Frontier: The Intersection of Wellbeing & Wealth**

Most family offices position themselves as having a "holistic service offering" for clients. There are standard services family offices offer, like investment management and trust planning, that are essentially table stakes. This has created an environment where family offices are getting creative on how to stand out from their competitors. One strategy seems to be expanding the risk management architecture around clients through services in insurance, healthcare advocacy, philanthropy, and security.

The pandemic brought health to the forefront of our lives, reminding us to put more of a premium on taking care of ourselves. Health and wealth are so interconnected, it seems odd that wellbeing isn't a pillar of every family office service model. In this session, we will explore the intersection of wellbeing and wealth, what role family offices can take, and the implications of doing so.

**Speakers:**

- John Samuels, Founder and CEO, Better Health Advisors
- Amanda Koplin, LPC, CEO, Koplin Consulting
- Jeff Lambert, Family Office Relations Consultant, LHT Consulting Group
- Moderated by Elyn Davis, Director of Advisor Family Office, Schwab Advisor Family Office

*This session qualifies participants for 1 CPE & 1 CFP credit.*

*Field of Study: Behavioral Ethics (CPE), Risk Management & Insurance Planning (CFP)*

*Learning Objectives: Attendees will learn the importance of identifying warning signs or specific client activities that may trigger the need for long-term care and how to navigate a plan with outside support.*

11:55am **Closing Remarks**

12:00pm **Networking Lunch**

*Lincoln Ballroom, 6th Floor*

1:00pm **Conference Concludes**

# CONTINUING EDUCATION



**CFP® certification:** This program will be submitted to the CFP Board for review. The Alliance will report attendance on your behalf to the CFP Board approximately two weeks after the event. The required fields on the signature sheet for each session must be complete and accurate to obtain credit.



**CPE® certification:** The Family Wealth Alliance is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

**Attendees must sign in and stay the entire session to obtain credit for each qualified session.**

All qualified sessions meet the following requirements:

Knowledge Level: Entry

Prerequisites: None

Advance Preparation: None

Delivery Method: Live.

Who Should Attend: Family wealth executives seeking insights into private client issues

Refund policy: Partial refunds of payment will be offered if the cancellation is made in writing to The Family Wealth Alliance, [info@fwalliance.com](mailto:info@fwalliance.com), five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies, please call 312-248-8820.

*Additional information is listed under each session in the agenda*

## ATTENDEES



For a list of event attendees, please scan this QR code. FWA events are all about connecting! We encourage you to connect with peers through LinkedIn, networking receptions, meals, peer groups, and your dance card throughout the event.

We look forward to connecting you!

# SPEAKERS

Thank you to all the speakers for sharing their time and insights with the FWA community!



**Victor Abiamiri**  
Portfolio Manager, Brown Advisory

Victor is a portfolio manager at Brown Advisory. He works with the portfolio management team to help manage the balanced accounts of their private clients. Prior to joining Brown Advisory, Victor played five seasons as Defensive End for the Philadelphia Eagles NFL team. He is a former summer intern of Brown Advisory and held additional internships at Park Lane in Los Angeles and Samuel James Limited in Baltimore.

Community Involvement: Alumni Board Member, Gilman School; Board Member, Baltimore Curriculum Project Drexel University, MBA; University of Notre Dame, BBA



**Kristen Bauer**  
CEO, Laird Norton Wealth Management

Kristen Bauer, the CEO of Laird Norton Wealth Management, has more than two decades of experience in private wealth management, financial services, and business management. She is passionate about working closely with multiple generations within successful families to help them navigate challenges, change, and generational transitions. Kristen joined Laird Norton Wealth Management in April 2020 and has led the firm through the mergers with Filament LLC in December of 2021 and Wetherby Asset Management in January 2022.

Before joining LNWM, Kristen was a senior leader at Tiedemann Advisors serving as Managing Director for the Pacific Northwest. She also led Tiedemann's national family office practice and managed the relationship with five national family office clients. At Tiedemann, she was instrumental in leading the organization through growth and transformation following Tiedemann's 2018 acquisition of Seattle-based Threshold Group.

Previously, Kristen served as CFO, Chief Business Development Officer, Chief Client Service Officer and then President of Threshold Group. She also created and built Threshold Group's Community Square initiative focused on shared family learning. Earlier in her career, she served as Director of Finance at Medalia Healthcare; and Manager-Assurance at Arthur Andersen LLP. She is a graduate of the University of Washington Foster School of Business with a Bachelor of Arts with an emphasis in Business and Accounting. She is a Certified Public Accountant (CPA) and a Personal Financial Specialist (PFS).

Kristen grew up in Bend, Oregon, which inspired her love of the outdoors and her ongoing involvement with environmental causes. She currently serves as Board Chair of The Nature Conservancy, Washington Chapter and is Board President of the Wilderness Awareness School. Kristen served on the board of the Young President's Organization (YPO) and is now a member of YPO gold.



**Bruce Benesh**  
Founder, Benesh Consulting Group

With more than 40 years of experience in all facets of compensation arrangements, Bruce Benesh is one of the most experienced compensation advisors for family-owned and privately held businesses. His work ranges from strategic compensation planning to internal human resource consulting, with an emphasis on the tax efficiency of arrangements. Bruce has broad consulting experience in many industries with companies ranging from closely held family businesses and family offices to multi-national corporations.

Before starting BCG, Bruce was the national managing partner for Grant Thornton's Human Capital Services and Family Business Practice. He was also the partner in charge of Arthur Andersen's North American and Latin American Human Capital Practice and the Divisional President of a consulting practice for a publicly traded company.



**Maria Chrin**  
Founder & Managing Partner, Circle Wealth Management

Maria L. Chrin is the founder and managing partner of Circle Wealth Management (CWM), an independent wealth advisory firm with offices in New York City and Summit, New Jersey. CWM works with a select group of ultra-high-net-worth families and endowments offering customized services, including financial planning, governance, and investment management. The firm manages about \$4 Billion for its clients. Before launching CWM in 2007, Maria co-founded Circle Financial Group (CFG), a peer-to-peer wealth management organization for women investors. Prior to CFG, she retired from Goldman Sachs after a 15-year career in the firm's Private Wealth Management Division. While there, Maria built a premier practice servicing domestic and international clients and managing several billion dollars in global equity and fixed income portfolios.

Maria is the epitome of an investment research specialist with depth of expertise and access to a robust flow of unique, high-growth investment opportunities and market intelligence. At CWM, Maria leads the Investment Committee with a due diligence process that embodies a culture of intellectual curiosity and healthy debate and benefits from the team's broad access, sourcing, and experiences. Her nimble investment approach and keen understanding of market psychology allow for unconventional, client-centric portfolio construction strategies.

A Honduras native and first in her family to attend college, Maria graduated Summa Cum Laude and Phi Beta Kappa with a B.S. in Business and Economics from Lehigh University and received an MBA in Finance and Marketing from Columbia Business School.

Maria has been a Trustee of Lehigh University since 2004, including service on the Executive Committee, as a Corporate Trustee, Chair of the Diversity Committee, and is currently Vice Chair of the Board. She was the first woman to chair the Investment Subcommittee, which oversees the school's endowment;

her term began during the financial crisis and her leadership helped the committee and investment team navigate the uncharted waters of the time. She was also the featured guest speaker at the Donald M. Gruhn 49 Distinguished Finance Speaker Series at Lehigh.

Maria is a member of the Board of Overseers of Columbia Business School, prior Board Director of Women Moving Millions, and was a Trustee of Kent Place School. Her philanthropic activities center around scholarship and education, specifically with a focus on financial education for women and girls. Maria has been named one of the Top 100 Women Financial Advisers by the Financial Times, honored as one of the 40 Women to Watch over 40, and quoted in The Wall Street Journal, Private Asset magazine, and the Journal of Wealth Management, among others.



**Michael Clark**

Senior Vice President, Chief Operating Officer, The Family Office at Synovus

Michael leads all aspects of non-client-facing functions for The Family Office at Synovus; this includes operations, technology, marketing/PR/communications, Family Enterprise operations, office administration, financial reporting and budgeting, strategic initiatives, HR, and recruiting.

Prior to joining Synovus in 2018, Michael was Director of the Cox Family Enterprise Center (CFEC) at Kennesaw State University, an internationally renowned Family Business Center, located north of Atlanta, Georgia. During his tenure, Michael led the efforts to transition the Center's third generation of executive leadership while managing day-to-day operations. This included managing the Advising for Continuity Program (a program to teach advisors how to better serve family business owners and clients of wealth), Advisor Networking events, and assisting with operations for The Family Business Clinic, the center's consulting arm. Before working at the CFEC, he was Marketing Manager for the Coles College of Business at Kennesaw State University where he played a pivotal role in creating the Office of Marketing and External Affairs. Michael was the recipient of the 2021 Kessel D. Stelling Emerging Leader Award at Synovus. He graduated from Kennesaw State University with an M.B.A., Concentration: Management, and a Bachelor of Business Administration in Marketing.



**Elyn Davis**

Managing Director of Advisor Family Office, Schwab Advisor Family Office

My role is to serve as a thought partner to our clients by listening to their needs and identifying opportunities to help them better serve the ultrahigh net worth community. I ensure that my team is doing everything we can to successfully support our Family Office clients. I joined Charles Schwab in 1997 and have held numerous leadership roles within our Service, Operations, Client Experience, and Transition Services organizations.



**Jim Foster**  
Managing Director, Greycourt & Co., Inc.

Jim Foster is a Managing Director of Greycourt & Co., Inc. and serves as a member of the firm's management committee. Jim advises wealthy families and institutional clients on investment strategy and portfolio construction as a member of Greycourt's advisor team. Jim served previously as Greycourt's Chief Investment Officer from 2012 to 2021. Jim has enjoyed a long investment career as a market maker in mortgage-backed securities, structurer of complex equity derivatives and swaps, and developer of analytics and simulation techniques to evaluate complex assets and support dynamic decision making. He has worked extensively across investment management, consulting, and distribution serving as a fiduciary and advising clients on asset-liability matters, after-tax asset allocation, manager structure and selection, performance analysis, and specific fiduciary and investment issues associated with concentrated securities positions. Jim taught for several years as an Adjunct Assistant Professor of Finance in the Stern School of Business at New York University and is currently teaching graduate students as an Adjunct Professor of Finance at Carnegie-Mellon University in the Tepper School of Business.



**Abigail George**  
Managing Director, Family Office Executive, CIBC Private Wealth

Abigail George is a managing director and Family Office Executive with the Family Office Group in St. Louis, with more than 10 years of experience. In this role, she manages all aspects of client relationships, serving as their trusted advisor and advocate, and leads a team of professionals to coordinate personalized and holistic family office services.

Previously, Abigail served as a family office executive at Lowenhaupt Global Advisors, which became part of CIBC Private Wealth in 2019. Prior to that, she worked in the Wealth Planning Solutions group for U.S. Trust, designing customized plans to help clients meet financial goals through estate and wealth transfer, charitable giving, and business succession. Abigail began her career as an estate and tax planning attorney with Bryan Cave Leighton Paisner.

Abigail received a Bachelor of Arts degree in philosophy, magna cum laude, from Colgate University, earned her Juris Doctor from Vanderbilt University School of Law, and completed her Latin Legum Magister (LL.M) in Taxation at the Washington University School of Law. Abigail is admitted to the Missouri Bar. Currently, she serves on the Board of Trustees for The Forsyth School and is actively involved with the Colgate University Alumni Association.



**Melinda Hightower**  
Managing Director, Head of Multicultural Strategic Client Segments, UBS

An accomplished strategist with a commitment to inclusive growth, Melinda (Mel) currently heads the UBS Multicultural Investors Segment within Wealth Management USA. In this role, Mel is responsible for the firm's strategy to connect with multicultural communities, cultivate an inclusive investor experience, and support the growth of multicultural and allied financial

advisors. Her team develops strategic marketing initiatives, champions product and solutions innovation, and identifies new business opportunities. Mel has a Juris Doctor from the University of Virginia School of Law, a Master of Business Administration from the University of Chicago Booth School of Business and a Bachelor of Science from the Cornell University School of Industrial and Labor Relations. A Detroit native, she currently lives in San Francisco.



**Scott Horn**  
President, TFO Phoenix

Scott focuses on helping families who want to unite their wealth and goals, empowering them to live the life they want. Scott is responsible for all services offered by TFO Phoenix and he focuses on delivering an outstanding client experience to all of TFO Phoenix's clients in an integrated, comprehensive manner.

Scott strives to be a trusted advisor to his clients throughout their unique journeys. He has extensive experience in a wide array of wealth management services, including coordinating and serving complex families, entities and family offices, providing comprehensive investment advisory and financial planning services, family education services and guiding the development of strategic philanthropic solutions. Additionally, Scott has significant experience in structuring debt facilities and establishing private trust companies.

Scott received his Bachelor of Arts degree in Accounting from Michigan State University, his Master of Science degree in Accounting from the University of Illinois and is a Certified Public Accountant (CPA). He enjoys being active in the community and is currently involved with Arizona Community Foundation, Children's Museum of Phoenix, TGen Foundation and Scottsdale's Museum of the West: Western Spirit.



**Rachel Hyman**  
President, The Family Wealth Alliance

Rachel D. Hyman is President of The Family Wealth Alliance. Rachel brings extensive experience in public, private, start-up, and non-profit entities such as Oracle, Motorola, E\*Trade, and Kellogg School of Management. She built her career creating and nurturing strategic relationships at every level inside and outside an organization, and is a passionate catalyst across stakeholders, leveraging the power of exceptional communication and collaboration.

As Vice President of Marketing, Rachel established both E\*Trade Financial's first B2B Client Advisory Board and Oracle's first Sales Advisory Board. She also founded a successful boutique consulting firm advising firms on marketing, strategy, and business development for over 20 years. Rachel is driven to make a positive impact through personal relationships and strategic initiatives at every stage of our growth.

Rachel holds an MBA from Kellogg School of Management at Northwestern University and a BS from The Wharton School at The University of Pennsylvania.



**Amanda Koplin**  
Founder and CEO, Koplin Consulting

Amanda Koplin, LPC is a mental health counselor, entrepreneur and thought leader who creates innovative solutions to fill gaps in the mental healthcare system. In 2016, she sold her first business, a mental health urgent care clinic, to create Koplin Consulting, a nationwide concierge behavioral health treatment team service.

Amanda frequently speaks to trusted advisors such as estate planners, trustees, family business offices, and wealth advisors to educate and support them in understanding how addiction, mental illness, and eating disorders impact the creation and implementation of estate plans. She is passionate about helping people achieve mental wellness and creating sustainable support systems and solutions which integrate seamlessly into real life.

Amanda is a speaker and a nationally sought-after consultant who specializes in creating unique treatment plans and recommendations for individuals struggling with psychological concerns such as addictions, eating disorders, lack of motivation, and other issues impacting mental wellness. She is particularly adept at involving trusted advisors and family members in order to create the greatest impact.



**Neil Kreuzberger**  
President & Founder, Kreuzberger | Associates

Under Neil's leadership and guidance, Kreuzberger | Associates has fostered the development of client relationships across many practice areas, including financial services, brokerage, investment management, technology, manufacturing, telecommunications, distribution, real estate and retail. Most recently, Neil has led the development of the firm's specialization in financial leadership searches for private foundations and multi-family offices. With over thirty years in the public accounting, technology, venture capital, real estate and executive search industries, Neil's experience is an invaluable resource to the Kreuzberger | Associates team.

He started his career with KPMG Peat Marwick in San Francisco, and spent three years auditing technology, real estate and manufacturing-driven companies. Prior to entering the executive search profession, he served as CFO for Walker Interactive, a \$30 million venture capital-financed supplier of financial application software.

Neil holds an MBA in Accounting and Finance from UCLA and is a licensed (inactive) CPA in California.



### **Jeff Lambert**

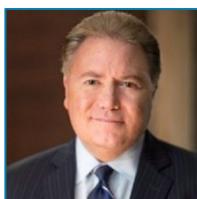
Family Office Relations Consultant, LHT Consulting Group

Jeff Lambert served for 24 years at RDV Corporation, a multi-generational family office located in Grand Rapids, Michigan. As Chief Financial Officer, Jeff headed the Services Group for the Corporation.

He began his career on the audit staff of KPMG working first in Fort Worth, Texas, and then Boston, Massachusetts. He then served for three years as Controller of Gulf Resources & Chemical Company.

In 1992, Mr. Lambert relocated to Grand Rapids, Michigan to join Guardsman Products, Inc. Following a brief period as Director of Business Risk Assurances and Economic Evaluation for office furniture maker Herman Miller, Mr. Lambert then joined RDV Corporation in 1997.

In his senior executive role with RDV Corporation, the family office for the late Richard & Helen DeVos, Jeff spent over 10 years co-leading the planning and execution of the funeral and related memorial activities for Mr. & Mrs. DeVos. RDV Corporation engaged LHT early in this planning process and Jeff worked alongside the team for many years. Jeff has spoken about his experience in this area at several family office meetings and conferences throughout the country. Upon his retirement from RDV Corporation, Jeff joined the LHT team as a consultant in April 2022.



### **Tom Livergood**

CEO & Founder, The Family Wealth Alliance

Tom Livergood is CEO of The Family Wealth Alliance, which he founded in 2003. In 2016, he also created a spin-off organization called Bespoke: The Private Family Advocate. Tom grew up in a third-generation family business in Central Illinois that was sold while he was in college in the 1970s. After that, he simply grew up in this business - first as a financial planner in the 1980s with CIGNA, then as a private banker with the Harris Bank of Chicago in the 1990s. In the early part of the 2000s, Tom was a Director at Family Office Exchange, charged with starting their MFO Community.

Named three times by Worth magazine as one of the Top 300 Financial Advisors in North America, he has held many volunteer positions, including being a founding national director of the 30,000-member Financial Planning Association at the time of its merger in the year 2000. Tom also held the CFP® certification from 1995 through 2008.

Tom and his organizations have been recognized as innovative leaders in the family wealth space. He has spoken at numerous gatherings throughout North America and in London and Hong Kong, as well as appearing and being quoted in national print, broadcast, and online media. A double graduate of Bradley University, he holds the BA in Liberal Arts and the MBA in Finance.



**Rory S. Melick**  
Partner, Head of Human Capital Management, Lord Abbett

Rory Melick serves as the Head of Human Capital Management. In this role, he advises the business on all aspects of its investment in people and culture. He is responsible for leading the firm's efforts in the areas of talent acquisition, employee experience, diversity and inclusion, learning and development, compensation and benefits, and organizational change. He also serves on the firm's Executive Committee and Leader Development Committee.

Mr. Melick joined Lord Abbett in 2018. Prior to his current role, he served as Head of Employee Experience responsible for enhancing our employee experience through people strategy design and development, performance management and talent alignment to strategy, learning initiatives, and engagement of our employees to embrace our values and achieve our vision. His prior experience includes serving as Director/Manager at PwC; Group Remuneration and Reward Manager at Toll Holding and Manager, Regional Reward at National Australia Bank. He has worked in the financial services industry since 2002.

He earned a Bachelor in economics and finance from the University of Sydney and a Masters of Commerce in professional accounting from the University of New South Wales in Australia. He also is a holder of the Chartered Accountant (CA) designation.



**Seiji Nishimura**  
Head of US Intermediaries, Pictet Asset Management

Seiji Nishimura serves as Head of US Intermediaries at Pictet Asset Management US, a division of the Pictet Group. Seiji is a specialist in the distribution of investment management services through the building of strategic partnerships in the intermediary distribution channel. He leads a team of experienced business development professionals to manage and expand relationships with US Sub-advisory partners, Global Financial Institutions, OCIOs, and US Offshore investor advisory networks.

Seiji joined Pictet in 2009 and prior to being appointed as Head of US Intermediaries, Seiji held many roles including Head of Global Financial Institutions, Senior Sales Manager and Sales Analyst.

Seiji holds a MSc in Economic History from the London School of Economics and Political Sciences.



**Rick Pitcairn**  
Chief Investment Officer, Pitcairn

A member of Pitcairn's leadership team, Rick is focused on long-term, global investment strategies designed to achieve better outcomes for wealthy families. He is the chief architect behind Pitcairn's open architecture investment platform and a leading authority on the use of tax overlay and Unified Managed Accounts (UMA) in trust structures and for the ultra-high net worth investor.

Rick is a frequent speaker and author on investment topics including long-term investing for families, due diligence, tax overlay, and global asset allocations. He has contributed his expertise to various investment media outlets including: Fox Business Network's Countdown to the Closing Bell, Bullseye Brief, Wharton Business Radios Behind the Markets Podcast, Bloomberg, Barron's Penta, The Wall Street Journal, The International Family Offices Journal, Private Wealth, Investment News, and Family Office Review. Furthermore, Rick was recognized as Outstanding Multi-Family Office Executive by Family Wealth Report in 2016, as well as Multi-Family Office CIO of the Year by Family Office Review in 2013.

In addition, Rick is a founding member and past chairman of the Wigmore Association, a global collaboration of chief executive officers and chief investment officers from eight family offices across North America, Europe, Australia, and South America. The group exchanges views, research, and insight to enable members to enhance their global perspectives and enrich their business models and investment processes.

A fourth-generation family member, Rick has over 25 years of committee and board involvement with Pitcairn. Prior to joining our team, Rick was the Chief Investment Officer and Partner at Kaffie, Goodman, & Pitcairn, Inc. and Senior Manager, Portfolio Manager, and Investment Analyst at Piedra Capital, both located in Houston, Texas.

Rick holds the designation of Chartered Financial Analyst and is a member of the Financial Analysts of Philadelphia. He has an MBA in Finance from Rice University and a BBA in Accounting with honors from the University of Houston. Rick's interest in capital markets has led him to become an avid world traveler. When he's not working or traveling, he enjoys fly fishing and the opera. Rick currently serves as Chairman of the Academy of Vocal Arts Board of Directors, located in Philadelphia.



**Brian Portnoy**  
CEO, Shaping Wealth

Brian Portnoy, Ph.D., CFA, is an expert in the psychology of money. He is the founder of Shaping Wealth, a coaching and content platform inspiring financial wellbeing globally. Brian's multiple bestselling books, most notably *The Geometry of Wealth*, have been published in 8 languages. He previously worked for 20 years in the hedge fund and mutual fund industries as investor, researcher, and educator. He serves on the ambassador's council of the Alliance for Decision Education, is a CFA Charterholder, and earned his doctorate at the University of Chicago.



**John Samuels**  
Founder and CEO, Better Health Advisors

For over 20 years, John has served as a senior healthcare leader in New York City's top hospitals including Northwell Health (formerly known as North Shore LIJ) and Mount Sinai Beth Israel.

Responsible for the operation of 16 emergency departments and a rapidly expanding network of urgent care centers, he sat at the helm of a system that touched nearly 800,000 lives per year. John's tenure in healthcare is marked by a ceaseless effort to improve patient care and satisfaction. This includes implementing staff training programs, managing surges to emergency rooms, reducing the time it takes to see a doctor, creating Alzheimer's programs and many more innovations.

Through his two decades of work in hospitals, John has developed relationships with top doctors and facilities, and has strong connections with all major hospitals. In 2016, he founded Better Health Advisors, a national healthcare advisory practice, based out of New York City. As chief advisor, John uses his extensive healthcare experience and wide network of medical professionals to achieve the best possible care for his clients.

John earned his Master of Public Health from the University of Massachusetts, Amherst, and graduated from the Academy of Healthcare Leadership Advancement at Cornell University. He is a licensed nursing home administrator in New York and New Jersey. John formerly served on the Board of Directors of the National Association of Healthcare Advocacy Consultants, the country's foremost organization for patient-centered approach to medicine, which advocates for rigorous standards in assisting patients with medical decisions. He was recently named the Chief Medical Administrator and advisory board member for the State Trooper Surgeons of the New York State Troopers Police Benevolent Association, and he serves on the boards of directors for Mary McDowell Friends Academy and the Sepsis Alliance.



**Tim Spidel**  
Founder, Spidel Burnfin

Tim Spidel is a Managing Partner with Spidel Burnfin based out of Carmel, Indiana. Prior to founding Spidel Burnfin in 2007, Tim spent 11 years with the international search firm of SBR, working in their Nashville and Chicago offices. Tim has run a successful desk in the wealth management industry since he began in this profession in 1996.

He represents companies that primarily include single family offices, multi-family office groups and fee-only Registered Investment Advisors (RIAs). Although Spidel Burnfin is based in the Midwest, the firm serves clients nationwide.

Tim grew up in the small town of Kendallville, Indiana, before attending Indiana University where he graduated with a degree in Health Administration. After spending some wonderful years living in Nashville and Chicago, Tim and his family moved to the Indianapolis area. Tim, his wife and their three children currently reside in Carmel, IN with their dog, Theo.



### **Rusdi Sumner**

Chief Operating Officer, Market Street Trust Company

Rusdi joined Market Street in 2020 to lead the financial planning program and to oversee the management of client relationships. In addition to her continued work with financial planning, Rusdi leads the operations and information technology teams. In her role, she works closely with Market Street's leadership, relationship managers, as well as the Trust, Tax, Investments, and Insurance teams to cooperatively deliver an exceptional client service experience.

Prior to joining Market Street, Sumner was Vice President and Managing Director of Tompkins Financial Advisors, overseeing approximately \$1.6 billion in assets under management. In addition to leading a team of financial advisors, trust officers, portfolio managers, financial planners and wealth associates, she also served on the Tompkins Trust Company Bank's leadership team and as an Innovation Ambassador. Prior to being appointment Managing Director, Sumner was responsible for financial planning for the Central New York region, serving clients located throughout the country. Before joining Tompkins Financial Advisors, Sumner was President and Co-Owner of Avalon Homes, a custom home building and land development company for 10 years.

Sumner received a B.A. from Cortland State University summa cum laude in Business Economics and Communications. She also holds a dual-degree MBA with distinction from Cornell University's Samuel Curtis Johnson School of Management and the Smith School of Business, Queens University (Kingston, Ontario, CA). Rusdi serves on the board as Treasurer for the Ithaca Community Childcare Center and previously served on the boards of Habitat for Humanity and Better Housing for Tompkins County.



### **Lauren Wood**

Wealth Manager, Wetherby Asset Management

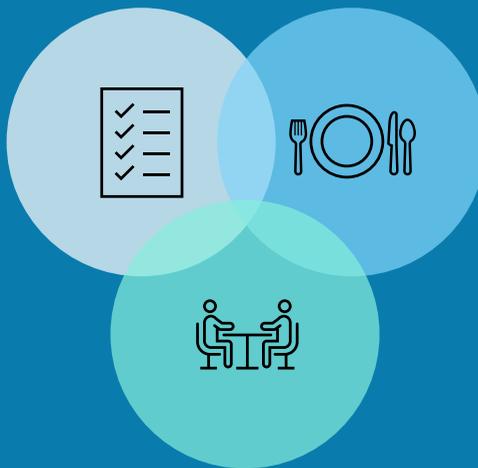
Lauren's investment and wealth management career began with an internship at MSD Capital prior to her first year in the MBA program at Columbia University. The following summer, she interned for Credit Suisse and was subsequently offered a full-time Associate position in Equity Research. After three years, she was hired by Wetherby as a Senior Wealth Associate for its New York office in 2015. She was promoted to Wealth Advisor in 2017 and then to Wealth Manager two years later. In 2020, Lauren relocated to launch and lead Wetherby's office in Los Angeles, California. In January 2022, Wetherby Asset Management merged with Seattle-based RIA and trust company, Laird Norton Wealth Management.

# Attendee Tips

**Alliance Events** are known for a welcoming and collegial atmosphere unlike anything else in the industry. To make the most of your experience, don't miss out on these key networking activities. They're designed to connect you with peers, potential partners, mentors, and mentees.

## DANCE CARDS

Tucked into your event badge, you'll find a list of six people FWA thinks you should meet while you're here. Introduce yourself – you won't regret it!



## DINE-AROUNDS

Always a highlight, Dine-Arounds are lively 10-20-person private dinners hosted by Strategic Partners. If you are attending, you'll find a color-coded sticker on the back of your badge.

MUST INDICATE INTEREST AT TIME OF REGISTRATION

## PEER GROUPS

Discuss timely issues with professionals of compatible and complementary backgrounds hand-selected by FWA. Find your peer group number on the back of your badge.

Please wear your event badge at all times and return it to our staff desk when the event concludes. If you have any questions during the event, FWA staff will be near the main entrance. Just look for an FWA staff sticker on their name badge!

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