THE FAMILY WEALTH ALLIANCE

WE CONNECT YOU℠

2022 Alliance Fall Forum

Attendees

October 18-20 | The Union League Club of Chicago

Attendees

Victor Abiamiri
Portfolio Manager
Brown Advisory
Professional profile

Jessica Andrews
President
Bridger Trust Company
Professional profile

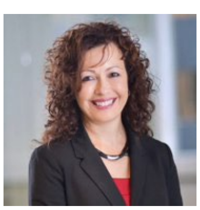
Carly Arison
President & COO
Syntax
Professional profile

Karen Asbra
Chief Operating Officer
Rappaport Reiches Capital Management
Professional profile

Rich Austin
Executive Director
Integrated Partners
Professional profile

Kristen Bauer
CEO
Laird Norton
Professional profile

Jon Beatty
Chief Operating Officer, Advisor Services
Schwab Advisor Services
Professional profile



Jessica Beavers
Sr. Vice President
Sawmill Trust Company
Professional profile

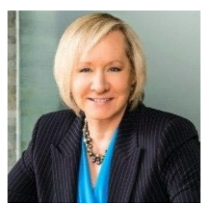
Bruce Benesh
Managing Principal
Benesh Consulting Group
Professional profile

Kayla Benz
Relationship Manager, Senior Vice President
Rockefeller & Co.

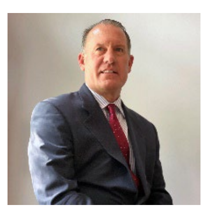
Katie Berganske
Director of Brand & Business Development
Clearwater Capital Partners
Professional profile

Matt Blackburn
Managing Director
Class VI Partners
Professional profile

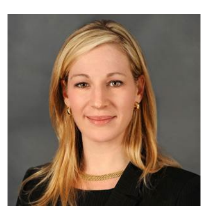
Bob Boetticher
President/CEO
LHT Consulting Group
Professional profile



Lynne Born
Chief Practice Officer
Aspiriant
Professional profile



Chris Boyce
Senior Consultant
Schwab Charitable
Professional profile



Allison Brill
Strategic Advisor
Brown Advisory
Professional profile

Kim Brinkman
Trust Officer
The Connable Office
Professional profile

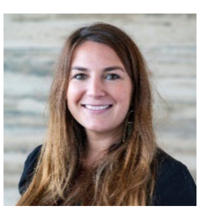
Colin Brooks
Vice President
Sawmill Trust Company
Professional profile

Eddie Brown
Managing Director, Head of Schwab Advisor Family Office and Premier Wealth Group
Professional profile

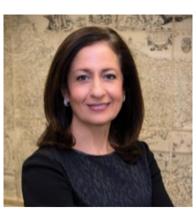
Todd Burach
SVP & Relationship Manager
Entertainment Division
City National Bank
Professional profile

Ken Cameron
Partner
Grant Thornton

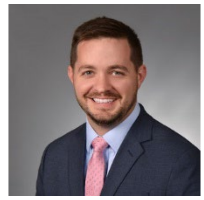
Kevin Casey
Director, Corporate Development & Strategy
Pathstone
Professional profile



Anna Chaiken
Director, Project Managment
Ritholtz Wealth Management
Professional profile



Maria Chrin
Founder and Managing Partner
Circle Wealth Management
Professional profile



Michael Clark
COO
The Family Office at Synovus
Professional profile

Trevor Cobb
CEO
Avantia
Professional profile

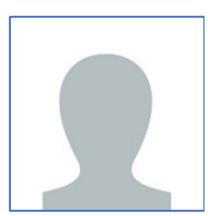
Lisa Colletti
Managing Director - Family Office
Aspiriant
Professional profile

Carson Coyle
Business Development
PPB Capital Partners
Professional profile

John Cremins
Managing Partner
Friedman & Huey Associates
Professional profile

Steve Czocher
Advisor
Gresham Partners
Professional profile

Elyn Davis
Director, Advisor Family Office
Schwab Advisor Family Office



Michelle Deal
Director of Family Service
White River Consulting

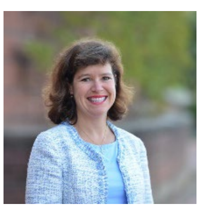
Jeremy Diem
Managing Director, Advisor Relations
PPB Capital Partners
Professional profile

Tim Dillow
Chief Operating Officer
Cypress Holdings Group
Professional profile

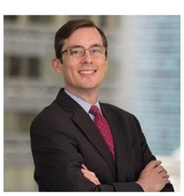
Carolyn Donnelly
Executive Director, Client Initiatives
CIBC Private Wealth
Professional profile

Candace Duecker
Principal, Managing Director
Seneschal Advisors
Professional profile

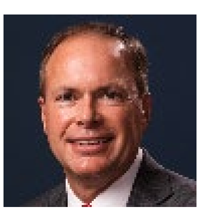
Jeff Duffer
VP of Client Relations
LHT Consulting Group
Professional profile



Katherine Dunlevie
President and CEO
Synovus
Professional profile



Todd Eckler
Executive Director
Fiduciary Trust Charitable
Professional profile

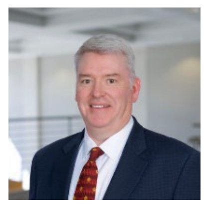


Trey Eldridge III
General Counsel, COO, and Compliance Director
The Connable Office
Professional profile

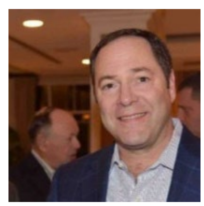
Mia Erickson
Senior Client Advisor
Rockefeller & Co.
Professional profile

Kelly Ewart
VP of Strategic Relationships
PURE Insurance
Professional profile

Jason Farler
Senior Managing Director
Johnson Investment Counsel
Professional profile



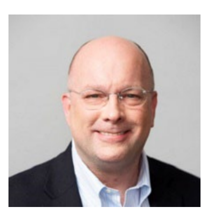
Paul Ferguson
Managing Director
Schwab Advisor Family Office



David Fisher
Executive Managing Director
Cresset
Professional profile

Karen Fleming
Director
FORVIS Private Client
Professional profile

Calvin Ford
Director
Pentastar Aviation



Jim Foster
Managing Director
Greycourt & Co.
Professional profile

Olivia Froehlich
Marketing
Risclarity
Professional profile

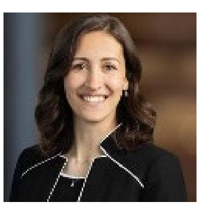
Chris Gandhu
Partner, Family Office Leader
KPMG Canada
Professional profile

Abigail George
Managing Director, Family Office Executive
CIBC Private Wealth
Professional profile

Jack Ginter
CEO
Callan Family Office
Professional profile

Jay Goetschius
Managing Director & Head of Florida
Pitcairn
Professional profile

Eric Gonzaga
Principal, Human Capital Services
Grant Thornton
Professional profile



Val Gorman
Chief of Staff
Cresset
Professional profile

Bruce Gover
Partner, Head of the Strategic RIA Group
Lord Abbett & Co.
Professional profile

Sharon Gupta
Director, Marketing
Pathstone
Professional profile

Wende Headley
CEO
Quantum Financial Advisors
Professional profile

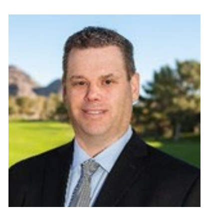
Rick Higgins
Chief Innovation Officer
Risclarity
Professional profile

Mel Hightower
Managing Director, Head of Multicultural Strategic Client Segments, UBS
Professional profile

Greg Hill
President, PWT
Pisces Wealth Team
Professional profile

Gary Hirschberg
CEO & Founding Member
Aaron Wealth Advisors
Professional profile

David Hodnett
Director of Diversity, Equity and Inclusion
Brown Advisory
Professional profile



Scott Horn
President
TFO Phoenix
Professional profile

Tom Howe
Chief Operating Officer
BMO Family Office
[Professional profile]

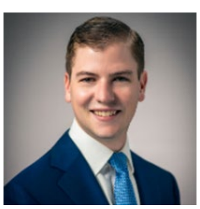
Phil Ierardi
VP Sales US & Canada
Eton Solutions
[Professional profile]

Allen Injijian
Head of Wealth Strategy
Geller Advisors
[Professional profile]

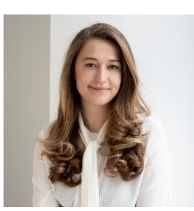
Jeff Janes
National Marketing Leader
Marsh McLennan Agency
Private Client Services
[Professional profile]

Kim Kamin
Partner & Chief Wealth Strategist
Gresham Partners
[Professional profile]

Rick Kappler
CEO/CIO
Sharp Family Office



Tom Kelly
Chief Investment Officer
SJS Investment Services
[Professional profile]



Ana Kenworthy
Sales Manager
Pictet Asset Management
[Professional profile]

Christian Klaas
Partner
Friedman & Huey Associates
[Professional profile]

Carl Knecht
CTO
Risclarity
[Professional profile]

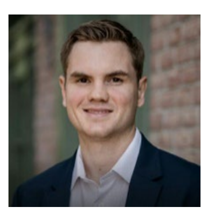
Josh Kommer
Portfolio Manager
Truepoint Wealth Counsel
[Professional profile]

Amanda Koplin
Founder and CEO
Koplin Consulting
[Professional profile]

Amy Labossiere
Senior Director, Client Relationships & Tax
Bridger Trust Company
[Professional profile]

Jeff Lambert
Family Office Relations
LHT Consulting Group
[Professional profile]

Jeff Lang
Managing Principal
Seneschal Advisors
[Professional profile]



Jeremy Langlois
Chief Revenue Officer
Mirador
[Professional profile]

Keaton Layman
Client Advisory Associate
Avantia
Professional profile

Kelly Leeper
Vice President
Bridges Trust
Professional profile

Bob Legan
Principal
G1 Partners

Tricia Levin
Managing Director
Geller Advisors
Professional profile

Jesse Levitt
SVP, National Deposit Sales Manager
TriState Capital Bank
Professional profile

Adam Lieb
Principal, Senior Client Strategist, Global Family Office
BNY Mellon Wealth Management

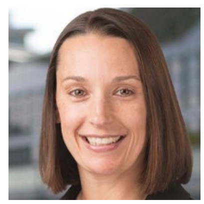
Katherine Lintz
Partner, Managing Member
Matter Family Office
Professional profile

Don Ludwig
Vice President, Datafaction Sales Lead
AgilLink
Professional profile

Chad Maggard
Managing Director
Johnson Investment Counsel
Professional profile

Rob Mallernee
CEO
Eton Solutions
Professional profile

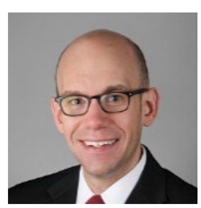
Damien Martin
Partner
FORVIS Private Client



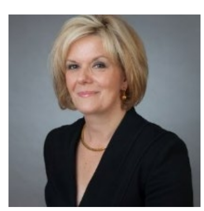
Jill Matesic
Family Office Strategist
Schwab Advisor Family Office
Professional profile

Drew McMorrow
President & CEO
Ballentine Partners
Professional profile

Rory Melick
Partner, Head of Human Capital Management
Lord Abbett & Co.
Professional profile



Mitchell Meneau
Partner
Perkins Coie
Professional profile



Amy Michaliszyn
Senior Vice President
Federated Hermes

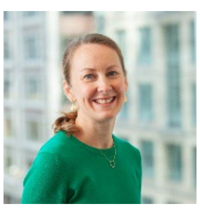
Nikki Michelini
Managing Director
Bespoke Advocate
Professional profile

Kelly Moore
Director of Business Development
Arch
Professional profile

Erin Moyer
Managing Director, Marketing & Communications
Laird Norton
Professional profile

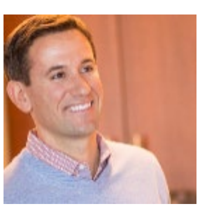
Molly Mulligan
Brand Strategy Manager
Market Street Trust Company
Professional profile

Susan Muston
Sales Program Director
AIG Private Client Group
Professional profile



Anna Nichols
Director of Communications
Altair Advisers
Professional profile

Seiji Nishimura
Head of US Intermediaries
Pictet Asset Management
Professional profile

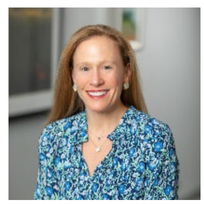


Chad Norfolk
Sr. Financial Advisor - Shareholder
WMS Partners
Professional profile

Kate Norris
Managing Principal
Attenuer Risk
Professional profile

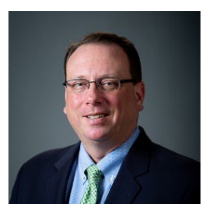
Jonathan Novy
Adviser
Ritholtz Wealth Management
Professional profile

Michelle Odom
VP of Business Development
Mirador
Professional profile



Alexandra Ollinger
Sr. Wealth Advisor & Shareholder
Truepoint Wealth Counsel
Professional profile

Lisa Olson
Sr. Relationship Manager
G1 Partners
Professional profile



Bill Onorato
Family Office Practice Leader
RKL Wealth
Professional profile

Kara Pass
President & CEO
Market Street Trust Company
Professional profile

Rick Pitcairn
Chief Investment Officer
Pitcairn
Professional profile

Rick Pomeroy
Senior Managing Director
BMO Family Office
Professional profile

Brian Portnoy
Founder
Shaping Wealth
Professional profile

Jennifer Pratt
Director of Strategic Services
Synovus

Jen Proper
Managing Director, Wealth Strategies
Pitcairn
Professional profile

Christopher Quinn
Executive Director, CIBC Family Office
CIBC Private Wealth
Professional profile

Dan Rahill
Senior Wealth Strategist
Wintrust Wealth Management

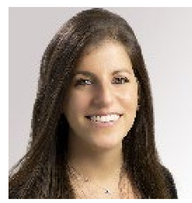
Royce Ramey
Chief Experience Officer
Tolleson Wealth Management
Professional profile

Jenn Rapoza
Director, Client Experience
Integrated Partners
Professional profile

Lisa Salvi
Managing Director, Advisor Services
Schwab Advisor Services
Professional profile

John Samuels
Founder and CEO
Better Health Advisors

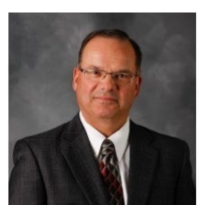
Scott Savage
Founder and CEO
SJS Investment Services
Professional profile



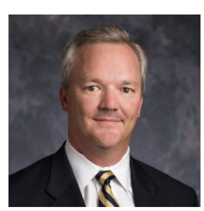
Maddie Scheler
Chief of Staff
Circle Wealth Management
Professional profile

Greg Schwab
President and CEO
Haute Explore

Sandy Schwab
Partner
Haute Explore
Professional profile



Jim Sekel
Senior Vice President - Private Bank
TriState Capital Bank
Professional profile

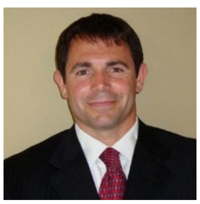


Mark Sitzman
Managing Director
Foundation Source
Professional profile

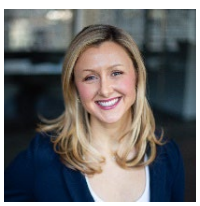
John Sleeting
Executive Partner
Clearwater Capital Partners
Professional profile

Thomas Smith
Senior Director
BNY Mellon Wealth Management

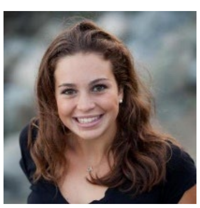
Ben South
Director
Sharp Family Office



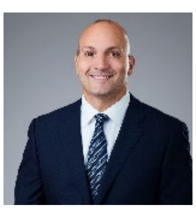
Tim Spidel
Managing Partner
Spidel Burnfin
Professional profile



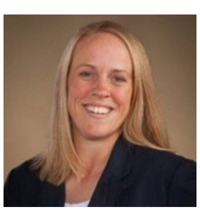
Adrianna Stasiuk
Managing Director, Investment Advisor
Aaron Wealth Advisors
Professional profile



Alexa Steriti
Chief of Staff
Ballentine Partners
Professional profile



Jay Strippoli
Relationship Manager, Portfolio Management, Managing Director
Glenmede Trust Company
Professional profile

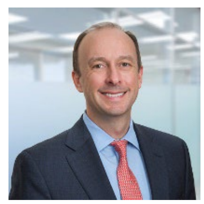


Rusdi Sumner
Vice President, COO
Market Street Trust Company
Professional profile

Scott Sumner
Head of Custody
Fiduciary Trust
Professional profile

Scott Swanson
Chief Technology Officer, Advisor & Partner
Quantum Financial Advisors
Professional profile

Jon Sweet
Managing Director
Syntax
Professional profile

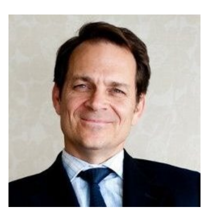


Scott Thompson
Team Executive & Co-Director of CIBC Family Office
CIBC Private Wealth
Professional profile

Christi Van Rite
Owner
White River Consulting
Professional profile

Ashlee Vieregger
Senior Lead Advisor
Foster Group
Professional profile

Monica Walter
Principal
Family Enterprise Bridges
Professional profile



Randy Webb
Partner
Brown Advisory
Professional profile

Courtney Weber
Director of Client Relations and Shareholder
Truepoint Wealth Counsel
Professional profile

Jacquie Weflen
Family Wealth Strategist/Partner
TFO Phoenix
Professional profile

Katie White
Business Development Officer
1919 Investment Counsel
Professional profile

Mike White
Senior Vice President
Jensen Hughes
Professional profile

Mark Wickersham
VP, Family Wealth
AgilLink
Professional profile

Brian Willer
Senior Vice President/Sr Sales Representative
Federated Hermes

Cara Williams
Chief Client Service Officer
Wetherby Asset Management
Professional profile

Lauren Wood
Wealth Manager, Shareholder
Wetherby Asset Management
Professional profile

Dalyce Young
Director of Client Experience
Class VI Partners
Professional profile

Allison Zito
Sr. Business Development Manager, Northeast
AIG Private Client Group

The Family Wealth Alliance Team

[Team page]

Tom Livergood
Founder & CEO

Rachel Hyman
President

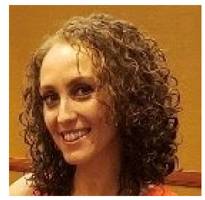
Brooke Morimoto
Senior Director, Member Experience

Brandelynn Perry
Senior Director, Strategic Planning

Julie Dragilev
Finance Manager

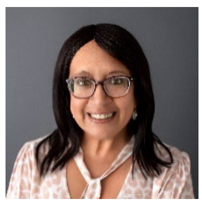
Emily Gorz
Program Associate

Sarah Sloan
Member Experience Manager



Heather Moore
Member Experience Associate

Gabriella Vokaty
Office Manager, Executive Assistant



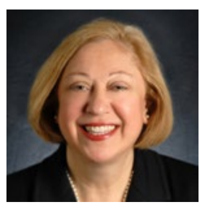
Neela Johnston
Event Consultant

Keith Johnston
Event Consultant

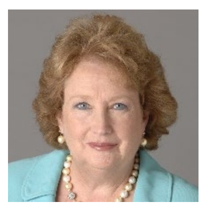
The Family Wealth Alliance Advisory Board

Neil Kreuzberger
President
Kreuzberger Associates

John Lotka
President
Maximum Impact Partners



Mariann Mihailidis
Principal
M2 Connections



Loraine Tsavaris
Retired Senior Advisor

THE FAMILY WEALTH ALLIANCE
WE CONNECT YOU℠