speaker biographies

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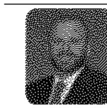
(Craft continued...)

Women's Westchester Bar Association, the Brooklyn Bar, New York County, New York City, New York City Woman's Bar and the New York State Bar Association Divisions of Real Property, Tax, Intellectual Property. She is also a member of the bar of the U.S Supreme Court.

Additionally, she is a member of many Family Office Associations. She currently serves on the Advisory Board for Family Office Exchange. She is also a committee member for the NYSSCPA Family Office Committee in New York and serves on the Steering Committee for the NYU Sterns Family Office Council. She is a frequent speaker on Family Office Topics including Family Office/Family Operating Companies and their synergies.

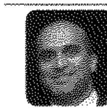
Tony Deegan, Executive Vice President, WALTON ASSET MANAGEMENT L.P.



In this role, Mr. Deegan collaborates with Walton Development and Management L.P. and Walton International Group Inc. in seeking new partners and raising institutional capital for equity investments in future development projects. Tony is also responsible for promoting Walton's prospectus-based products to IIROC brokers across Western Canada. In addition, he focuses on a number of corporate initiatives including efforts in building relationships with lending institutions to meet the Walton Group of Companies' existing and future financing requirements.

Tony has held a variety of senior-level positions within the company. Prior to taking on his current role, Tony was Senior Vice President, Channel Development for Walton International Group Inc.; Senior Vice President, Operations between August 2008 and March 2009; Senior Vice President, International Marketing from May 2007 to August 2008; International Marketing Manager from December 2002 to April 2007; and Account Manager from December 2001 to December 2002.

Adi Divgi, President, EA GLOBAL LLC (SFO)



Adi Divgi currently manages investments on behalf of his single family office, EA Global, and provides advisory services on alternatives to clients. Prior to EA Global, Mr. Divgi worked as a director at Auriga, managing a portfolio of US RMBS and Latin American corporate credits. Prior to Auriga, Mr. Divgi co-managed the secondary credit and structured finance portfolios at Patriarch Partners, with close to $5 billion in assets under management. Mr. Divgi began his credit career at Deutsche Bank, working in the New York and Mexico City offices, first in secondary trading followed by principal finance and Latin American securitization. A graduate of the Huntsman Program, Mr. Divgi has a BA in International Studies and Spanish from the University of Pennsylvania, and a BS in Economics and MBA in Finance from the Wharton School.

Elijah Duckworth-Schachter, Director of Strategy and Private Equity, POINT ON PERCENT, LLC

Elijah Duckworth-Schachter has spent his career in the investment and strategy consulting industries. His primary focus has been in the private equity arena and his experience includes working for many years in the Private Equity and Mergers and Acquisitions Practice at Mercer Management Consulting, now Oliver Wyman. Additional past experience includes working at a mezzanine debt fund sourcing and structuring lower middle market buyouts and working as a financial analyst in the Investment Banking Division of Lehman Brothers.

Today, Elijah divides his time between managing his family's office and acting as a principal at Point One Percent, a strategy consulting and branding firm focused on the luxury goods industry. Elijah is a graduate of Columbia College, Johns Hopkins School of Advanced International Studies and Columbia Business School. He is active philanthropically and acts as the Secretary of the Alumni Council of Kent School and is on the Philanthropy Council of the Peconic Land Trust.

Michael Felman, President, MSF CAPITAL ADVISORS (MFO)

Michael Felman is President and CEO of MSF Capital Advisors, a global multi-family office/merchant bank. His firm represents family offices and a select group of high net worth individuals. With a combined 40 years of financial and legal experience, MSF Capital Advisors has the knowledge and expertise to help families deal with issues such as wealth preservation, asset allocation, tax planning, business succession etc. Mr. Felman received his B.A from Clark University and JD from Pace University. Winner of Acquisition International/Preqin 2013 Global Multi-Family Office award. He is a frequent speaker at family office, hedge fund and emerging markets events.

Gerry Fields, LLB, JD, President and General Counsel, CORNERSTONE GROUP ™

Gerry Fields is the President and General Counsel of CORNERSTONE GROUP ™ located in the Toronto Stock Exchange Tower.

Founded in 1987, CORNERSTONE GROUP ™ acts as Strategic Counsel ™ by providing "turn-key" client-focused strategic consulting, financial advisory and comprehensive merger and acquisition services to its domestic and foreign clients operating in a multi-jurisdictional environment. The firm provides buy-side advisory services including advice on capital raising techniques, strategic case assessments and comparative analysis, acquisition searches, synergy analysis, risk management and acquisition valuations. Its sell-side advisory services include succession planning, operational and financial structuring, guidance on strategic and tactical options, valuation and transaction pricing and negotiation support. The firm also provides counsel and intermediation services for tax, estate planning and regulatory issues and for advisor and partner sourcing. Additionally, CORNERSTONE GROUP ™ offers operational, financial, regulatory, tax and intellectual property due diligence services under its Due Diligence Plus ™ Program.

Gerry has been a member of the Law Society of Upper Canada since 1974 where he has contributed as a guest lecturer and as a mentor. Gerry was formerly appointed as the General Counsel for Canada and the United States for the Fidinam Group of Companies

13:00	***Networking Lunch***	
14:30	**INFRASTRUCTURE & REAL ASSETS FOR FAMILY OFFICES** • The importance of these non-correlated assets • Are commodities still a good diversification tool for overall portfolio construction? • Why invest in infrastructure? • Options for investing in infrastructure • Case study and critical success factors for investing in infrastructure	***Moderator:*** Brent Barrie, LLB, CFA, CIM, CFP, Family Office Director, **FIRST AFFILIATED FAMILY OFFICE INC.** ***Panelists:*** David Rogers, Founder & Partner, **CALEDON CAPITAL MANAGEMENT INC.** Juan Caceres, President & Senior Investment Director, **FIERA AXIUM INFRASTRUCTURE** Jamie Storrow, Managing Director and Co-Head, Infrastructure Group, **NORTHLEAF CAPITAL PARTNERS**
15:15	**EVALUATION OF THE FIXED INCOME AND CREDIT MARKETS** • Overview of current fixed income markets • Investment grade pricing and future implications • High yield bonds, leveraged loans, and direct lending in today's corporate environment • Structured credit markets and opportunities	***Moderator:*** David Kaufman, President & CEO, **WESTCOURT CAPITAL CORPORATION (MFO)** ***Panelists:*** Adi Divgi, President, **EA GLOBAL (SFO)** David Fry, Co-Founder & CEO, **LAWRENCE PARK CAPITAL PARTNERS**
16:00	**NAVIGATING THE CHALLENGES OF THE TRUSTEE/ BENEFICIARY RELATIONSHIP** • What are the various types of trustees? What are the differences? What are the implications for trustee beneficiary relationship? - Individual Trustees - Private Trust Companies - Independent Trust companies - Large Corporate Fiduciaries • How can we plan for productive trustee beneficiary relationships? - Donor perspective - Trustees perspective	***Moderator:*** Thomas Moore, Director, **GREYCOURT & CO., INC. (MFO)** ***Panelists:*** Tricia Overdyke, Vice President, **WILLOW STREET FINANCIAL ADVISORS (MFO)** Matthew Rosin, Vice President-Legal Affairs, **COMMONWEALTH TRUST COMPANY** Kent Swig, Principal, **SWIG FAMILY OFFICE (SFO) / FULCRUM EQUITIES**
17:00	***Closing Cocktail Reception***	