



Michael Achterberg

- President, PREDEX Capital Management, LLC
- 29 years of experience in the investment management industry and extensive experience in fund management including due diligence, allocation of capital, and general supervision for multi-manager funds
- BS in business administration, California State University, Long Beach
- Chartered Alternative Investment Analyst (CAIA) and Series 65 securities registration
- Prior experience includes:
 - Chief Financial Officer - CITIC Securities International Partners
 - Partner and Chief Financial Officer - Strome Investment Management, Santa Monica, CA
 - Audit Manager - Coopers & Lybrand
 - National quality review program for the Coopers & Lybrand Investment Company practice



Lisa Asher

- Senior Consultant, Wealth Technology Analyst, F2 Strategy
- Wealth tech innovation professional, TAMP specialist, with expertise in the nexus of analytics, portfolio construction, and financial planning
- BS in economics, Wharton School of Business
- Chartered Financial Analyst (CFA)
- Prior experience includes:
 - XY Investment Solutions
 - Clearnomics
 - Fragasso Financial Advisors
 - First Annapolis Consulting



Mark T. Allen

- President & Chief Development Officer, Royal Oak Realty Trust
- Partner, Cambridge Street Asset Management LLC
- BS in finance, Miami University (Oxford, OH)
- MBA, Northwestern University - Kellogg School of Management
- Past honoree of Rochester Business Journal's "Forty Under 40" for business and civic contributions
- Board member for Oak Hill Country Club and the Rochester Charitable Business Organization
- Former board member for Center State CEO and Big Brothers Big Sisters of Greater Rochester
- Prior experience includes:
 - Over fifteen years as a Regional Executive with JP Morgan Chase Bank



Gene Balas

- Former Vice President, Investment Oversight at Goldman Sachs Personal Financial Management
- Over 30 years of experience in investment strategy, asset allocation, manager due diligence, alternative investments, and fixed income portfolio management
- Portfolio manager for institutional and ultra-high net worth investors, and in omnibus accounts
- Extensive media presence at TheStreet and Seeking Alpha
- MBA in finance, Columbia University
- Chartered Financial Analyst (CFA)
- Prior experience includes:
 - Director, Investment Management and Guidance, Merrill Lynch & Co., New York City
 - Director of Investments, Genworth Financial Asset Management
 - Portfolio Manager, Oppenheimer & Co., Inc., New York City

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Rob Brown

- Chief Investment Officer, Integrated Financial Partners, Inc., Integrated Wealth Concepts, LLC
- PhD in finance, Northwestern University - Kellogg School of Management
- Chartered Financial Analyst (CFA) and Series 7, 63, and 65 securities registrations
- Member of the Financial Planning Association, Financial Management Association International, CFA Society of Colorado, CFA Society of Dallas/Fort Worth, and CFA Society of Los Angeles
- Editorial board member for: Journal of Investing, International Journal of Economics, Finance and Management Sciences, and Journal of Finance and Market
- His publications have appeared in the Journal of Derivatives and Hedge Funds, Journal of Investing, Journal of Investment Consulting, Journal of Beta Investment Strategies, Pensions & Investments, FA Magazine, RIA Central, On Wall Street Magazine, Royal Alliance Associates Sourcebook, Bank Investment Consultant, Investment News Magazine, London Financial Times, Financial Planning, Financial Advisor, Journal of Financial Planning
- His online website is found at www.robbrownonline.com
- Prior experience includes:
 - Chief Investment Officer - United Capital Financial Advisers, Genworth Financial Asset Management, and the Arizona Public Safety Personnel Retirement System
 - Director - Curriculum, CFA Institute, Charlottesville, VA
 - Managing Director - SEI Investment Management, Oaks, PA



Gary Carrai

- Co-Founder, Senior Vice President, Product and Platform Strategy, LPL Financial Inc.
- BS in finance, Indiana University of Pennsylvania
- Chartered Financial Analyst (CFA)
- Member of the Washington Society of Investment Analysts (WSIA)
- Gary provides strategic direction for high-net-worth clients; and as co-founder of Fortigent, he grew the company from 2005 to 2012 to support 100 advisory firms with managed assets of \$75 billion
- Prior experience includes:
 - Co-founder - Fortigent, LLC
 - Managing Director - Lydian Wealth Management
 - Senior Analyst - Investment Company Institute
 - Analyst - NASDAQ



Jeff Chang

- Co-Founder, COO, and Head of Product Management, CBOE Vest
- BBA, Georgetown University - McDonough School of Business
- Chartered Financial Analyst (CFA), a Certified Public Accountant (CPA) and Certified Fraud Examiner (CFE)
- Series 4, 7, 24, and 63 securities registrations
- National instructor for the CFA review by Kaplan Schweser and CPA review by Becker Professional Education
- Prior experience includes:
 - ProShares where he was responsible for investment research and product management as well as conducting client training seminars and speaking engagements
 - FBR & Co, a middle market investment bank on their trading platform that included equity, high yield, convertible securities, listed options and mortgage trading
 - Freddie Mac
 - World Bank



Alex Condrell

- Managing Director, Cliffwater LLC
- BA, Pomona College, MBA, Georgetown University – McDonough School of Business
- Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA)
- Prior experience includes:
 - Managing Director, Monroe Capital
 - CIO of a Chicago family office
 - Portfolio Manager, Lotsoff Capital Management
 - Securities Analyst, Fannie Mae



Kate Davis

- Director - Real Estate, Harrison Street, Chicago, IL
- Portfolio management spanning the full range of alternate property types, including: storage, medical/life sciences, senior housing, and student housing
- MBA, University of Chicago - Booth School of Business
- Prior experience includes:
 - Managing Director - Real Estate, Benefit Street Partners, Franklin Templeton
 - President & Portfolio Manager, Broadstone Real Estate Access Fund, Broadstone
 - Executive Management Team, Broadstone Real Estate
 - Portfolio Manager and Head of Research & Operations - Resource Real Estate Diversified Income Fund, Resource America, Inc.
 - Microsoft Corp.



Todd Eklund

- Director of Portfolio Management, Klaas Financial, Madison, WI
- BA in economics, San Diego State University
- Chartered Financial Analyst (CFA), and Chartered Alternative Investment Analyst (CAIA)
- Member of CFA Society of New York, and is actively involved within the young leaders, alternative investments, and business management groups at CFA NY
- Prior experience includes:
 - Executive Director, HighTower Advisors, LLC, New York, NY
 - Portfolio Manager - United Capital Financial Advisers, LLC
 - Investment manager research, due diligence, and selection spanning traditional and alternatives
 - Todd was also closely involved in the execution and integration of 60+ acquisitions of wealth advisory practices into United Capital via M&A transactions
 - Pacific Life, Newport Beach, CA



Ryan P. Felde

- Texas Health Resources, Dallas, TX
 - Business Intelligence Strategist
 - Member of Operational Transformation Team
 - Operational efficiencies
- MBA, Business Analytics, Corporate Finance, Southern Methodist University
- Chartered Financial Analyst (CFA)
- Prior experience includes:
 - Portfolio Manager - United Capital Financial Advisers LLC, Dallas, TX
 - Canterbury Consulting, Newport Beach, CA
 - Marcus and Millichap, Encino, CA



Henry Ma

- CEO, CIO, and Founder, Julex Capital Management, LLC
- PhD in economics, Boston University
- MA in economics, Peking University
- More than 20 years of extensive hands-on and leadership experience in portfolio management, asset allocation, fixed income and global macro investments, and risk management
- Prior experience includes:
 - Portfolio Manager - Geode Capital Management
 - Designed and launched a global macro hedge fund which traded currencies, commodities and equity options
 - Director of Quantitative Research and Financial Engineering - Loomis Sayles & Co.
 - Director of Quantitative Research and Risk Management - Fortis Investments
 - Director of Fixed Income Strategies - Sun Life Financial



Dhruv Maniktala

- Principal and Head of Investments, True North Advisors, LLC, Dallas, TX
- MBA in finance, University of Georgia
- Chartered Financial Analyst (CFA)
- Member of the CFA Society of Dallas/Fort Worth
- More than 20 years of experience in public and private markets
- Leads the investment team and chairs the True North Investment Policy Committee
- Prior experience includes:
 - Principal and Director of Global Investment Management – Annandale Capital
 - Vice President and Equity Analyst – Wachovia Securities
 - Small Cap Analyst – Russell Investment Group
 - Private Infrastructure Manager - Mirant



Nathan Sonnenberg

- CEO and Founder, Wealth Management Consulting, LLC, Tysons, VA
- BS in systems engineering, University of Virginia
- Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA)
- Member of the CFA Society of Washington
- More than 20 years of industry experience with asset allocation, portfolio implementation, due diligence, and alternative investments, serving individual and institutional clients
- Prior experience includes:
 - Chief Investment Officer - Fortigent
 - Chief Investment Officer - Glassman Wealth Services
 - Director of Investments - Abbott Downing
 - Director of Asset Allocation and Risk Management - Lydian Wealth Management



Byron Stead

- Managing Partner, Broxton Capital Advisors, Los Angeles, CA
- Over twenty years of experience serving institutional and individual clients covering topics as varied as macroeconomic analysis, individual company evaluation, and bankruptcy reorganization
- BA in financial economics and mathematics, University of Michigan, Ann Arbor, MI
- Series 7 and 65 securities registrations
- Prior experience includes:
 - Morgan Stanley, Beverly Hills, CA
 - Chicago Board of Trade, Chicago, IL
 - Merrill Lynch, London, England



Dave Wiley

- President and Founder, WHW Investments, LLC
- Over thirty years of experience spanning both the institutional and retail investment industries
- MBA in finance, Duke University - Fuqua School of Business
- Chartered Financial Analyst (CFA)
- Member and former two-time President of CFA Society of Dallas / Fort Worth
- Consultant to RIAs and Hybrids relating to investment platform, external manager due diligence, policies and procedures, and regulatory compliance
- Curriculum editor, Global Association of Risk Professionals - Financial Risk Manager (FRM) exam
- Prior experience includes:
 - Vice President, JP Morgan Chase
 - Vice President and Division Manager, Kaplan Schweser
 - Expert Witness - Testimony and research specializing in securities and investments, portfolio management, asset allocation, and economic damages