



**For Immediate Release**

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## Alliance 40minus Summit Gathers and Acknowledges Rising Talent

Wheaton, Ill., March 31, 2009 -- The Family Wealth Alliance's inaugural **40minus Leadership Summit** was held on March 4-5, 2009 in Boston to recognize, reward, and network the rising talent in the family wealth industry. The industry-first event was attended by professionals forty years of age and under who were nominated by the heads of their firms for their exemplary leadership. The forty-three nominees represented a select number of advisory and provider firms from the family wealth space across the U.S.

Acknowledging the significant contributions made by up-and-coming professionals in the industry, Tom Livergood, CEO of The Alliance observed, "The family wealth industry has made a significant collective investment in human capital. We were pleased to gather this highly-talented group. It furthered their perspective, while at the same time recognized and rewarded their achievement". He added, "In this most challenging of times, it just felt good to do something positive for an industry that is filled with committed professionals".

The day-long event included panel discussions, peer group roundtables, and other networking and learning opportunities, including a group photograph to commemorate the event. Speaking at a reception on the eve of the Summit, Richard Bradley, Editor-in-Chief of Worth magazine in his keynote address titled, *The Clash of the Titans*, talked about the recent upheavals on Wall Street and how major financiers want to change the mode of doing business in the future.

Nominees in attendance included:

Kimberly Clouse of Athena Capital  
Coventry Edwards-Pitt of Ballentine Finn & Co.  
Drew McMorrow of Ballentine, Finn & Co.  
Arthur Black of BBR Partners  
Jeff Cline of BCU Risk Advisors  
Jamie Fagan of Bear Stearns & Co.  
Alexander J. Gross of Calibre  
Tony Owen of DOM Capital Group  
Bill Andrews of Equity Resources Investments  
Jennifer Christian Murtie of Federal Street Advisors  
Christine Rein of Fidelity Family Office Services

Nominees in attendance included: (cont.)

Johanna Longnecker of Fidelity Institutional Wealth Services  
Chris Wright of Foundation Source  
Eric Kalnins of Handler, Thayer  
Jarrett Bostwick of Hander, Thayer  
Berk Nowak of Highmount Capital  
Marcy Hall of Hub International Personal Insurance  
Christopher Thompson of Lowenhaupt Global Advisors  
Erik Oiler of Merrill Lynch  
Matthew Grady of Old North Advisors, LLC  
Tom Love of Pelagos Advisors  
Ben Harrison of Pershing Advisor Solutions  
Vivian Young of Schwab Institutional  
Anthony DeToto of Sentinel Trust  
Allison Taff of Silver Bridge  
Dune Thorne of Silver Bridge  
Scott Sumner of State Street Corporation  
Jill Iacono of State Street Global Advisors  
Katie Sullivan of Streamline Family Office, Inc.  
Neil Shapiro of TAG Associates, LLC  
Rick Higgins of WealthTouch  
Robert L. Rudnick of Wilmington Trust

The following executives were nominated, but were unable to attend:

Barry Glassman of Cassaday & Co.  
Dave Zier of Convergent Wealth Advisors  
Matt Steckler of DWS Investments  
Thomas Melcher of Hawthorn  
Darcy G. Bhatia of Highmount Capital  
Domenic DiPiero of Newport Capital Group  
Hugh McCutcheon of Osprey Leadership  
Dain Kistner of Pitcairn  
Alexandra Ollinger of Truepoint, Inc.

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The Family Wealth Alliance is an independent advocate and objective resource for private families and the firms that serve them. The firm helps private families find best-in-class multifamily offices throughout North America, as well as consults with single family office firms on their strategic alternatives. The Alliance also formulates standards, conducts, publishes and distributes its research, and serves as advocate for the needs of private families to further the body of knowledge in this nascent field. In 2005, the firm released the first-ever published Multifamily Office Standards. In 2008, the firm released its 5<sup>th</sup> Annual Multifamily Office Study. It is about to release the findings of its inaugural 2009 Single-Family Office Study in April, and will be doing both annual MFO and SFO studies this year. The Family Wealth Alliance is based in Wheaton, Illinois, USA.

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