Family Office Workshop

Tavistock Country Club
June 2, 2022

Agenda

Family Office Workshop
Thursday, June 2, 2022
Tavistock Country Club

10:00 am	**Doors Open**	
10:00 am	Refreshments are served	
10:15 am	**Bart Weisenfluh** Starboard Advisors	**Welcome!**
10:30 am	**Sean Kelleher** The Kelleher Family	**Passing of the Baton:** Managing the family business while maintaining its values.
11:05 am	**Hugh O'Donnell** True Equity	**The New Lifecycle of Private Equity:** From venture to buyout and other strategies.
Break		
11:50 am	**Jim Haefele &** **Jim Rogers** Haefele Flanagan	**Prepare to Sell!:** Planning considerations for families contemplating selling the family business.
12:30pm- 1:30pm: Lunch		
1:35 pm	**Kay Shah** Agreus Group	**Family Success:** Identifying successful leadership for serving family offices.
2:10 pm	**Travis Coley** White Penny	**Built to Last:** How families create long lasting value from a family brand.
Break		
2:50 pm	**Erich Hickey** Green Family Office	**This is Not a Drill:** Economics meets geopolitics- this time it's real.
3:25 pm	**Mike Ouellette** Starboard Advisors	**Honoring Intent:** Key factors to identify intent and build best practices to honor.
3:55 pm	**Bart Weisenfluh** Starboard Advisors	**Close**
4:00 pm	**Reception**	

Speakers

Barton W. Weisenfluh, CFP®
CEO & Founder
Starboard Advisors

Bart Weisenfluh has worked with families for over 20 years in the investment management and financial planning business. He began his career in the executive training program at Tucker Anthony, Inc. In 1998 he joined the New York based money management firm W.P. Stewart as Vice President and assisted with the opening of their Portland office. He co-founded Plimsoll Mark Capital in 2008 where he served as a fiduciary for families in North America. Mr. Weisenfluh holds a B.A. in Political Science with a minor in Japanese from Union College and an M.B.A. from the Whittemore School of Business at the University of New Hampshire. He also is a Certified Financial Planner™ professional. Mr. Weisenfluh has served on the board of directors for Big Brothers Big Sisters of Southern Maine, Portland Yacht Club, Add Verb Productions and the Falmouth Youth Lacrosse Association. In addition, he serves on private advisory boards for numerous families.

Sean Kelleher
The Kelleher Family

As President and Managing Partner, Sean has helped guide the firm through successful ventures in online brokerage, institutional research, equity trading, listed derivatives trading, fixed income trading and wealth management. He manages a team of traders and salespeople and is responsible for providing leadership and awareness for the WSA and KFA brands. In addition, Sean runs the firm's business development efforts and is responsible for the growth of the firm's Global Execution Services platform.

Sean is a graduate of Wagner College and sat on the Wagner College Finance Committee. Sean also serves on the board of the St Patrick's Day Parade- the oldest parade in the country. He also serves on the board of New World Prep, a charter school in Staten Island that the Kelleher Family helped launch and continues to support. He hold's the following licenses: Series 7,63,4,9,10 and 55. Sean and his wife Wendy have three children, Maggie, Jack and Denis.

Speakers

Hugh O'Donnell
Founder
True Equity

Hugh O'Donnell is the founder and managing partner of True Equity, a Venture Capital Fund which is actively investing in high growth companies with outstanding venture backers. Before founding True Equity, Hugh was Chief Investment Officer and Associate Vice President at Colby College where he was responsible for the management and oversight of Colby's endowment investment portfolio. The roughly $750 million portfolio is invested globally with external managers across public equity, private equity and hedge fund strategies. Prior to joining Colby, Mr. O'Donnell served in investment leadership positions at the Kamehameha School in Hawaii, Crescent Private Capital and TA Associates.

James R. Haefele
Partner
Haefele Flanagan

Since joining Haefele Flanagan in 1997, Jim has provided a variety of services to clients including tax consulting and compliance, general advisory, strategic business planning and budgeting, due diligence, business valuation and succession planning. He is regularly involved in negotiating loans and exploring financing alternatives for his clients with various financial institutions. Jim has extensive experience with the acquisitions and dispositions of business operations for corporations, partnerships, limited liability companies and sole proprietorships.

Jim is extremely active in his community, devoting a substantial amount of time to a number of professional and charitable organizations. He serves as treasurer for the Legacy Foundation, which supports Legacy Treatment Services in their mission to improve behavioral health and social service outcomes for people of all ages, taking them from surviving to thriving. Jim is also a coach for local youth soccer teams. When he's not working, Jim enjoys golf, exercising, and mostly, spending time with his wife, Kara and twins, Ryan and Sarah.

Speakers

James A. Rogers
Managing Partner
Haefele Flanagan

Managing Partner Jim Rogers has been with Haefele Flanagan since 1985 and offers more than four decades of national and regional experience. His areas of expertise include audit, private business consulting, succession planning, mergers and acquisitions, litigation support and forensic accounting.

A licensed CPA in Pennsylvania, New Jersey, New York and Delaware, Jim works primarily in the not-for- profit, real estate development, construction, service, manufacturing and leasing industries. He serves on the Board of Directors for the Building Industry Association of Philadelphia and Holy Redeemer Health System.

Outside of the office, Jim enjoys traveling and visiting the New Jersey shore with his wife, Jeanmarie. He is actively involved with The Alzheimer's Association and as a volunteer at Covid Vaccination Centers in Philadelphia. Jim is also a proud inductee of the La Salle University Hall of Athletes as a member of the 1977 Lightweight 8 Crew.

Kay Shah
Team Head- USA
Agreus Group

I am the Team Head for Agreus Group USA.
Having spent more than a decade working in London as a specialist recruiter, I moved to East Africa to work exclusively for an UHNW Family. After spending several years overseeing the recruitment for both the personal and business side of the family, I found an incredible opportunity to bring my perspective back to the global marketplace.

I now use this perspective to support Family Offices across the US and specialize in placing entry-level through to executive-level professionals within Investments, Legal, Accountancy and Finance and Operational roles.

Speakers

Travis Coley
Director of Growth & Strategy
White Penny

Travis is the Director of Growth & Strategy at Whitepenny. Leaning on two decades of strategic planning and corporate finance experience, Travis helps advise clients through the lens of gaining strategic advantage, growth, capital investment, and brand as an asset. He partners with clients to define brand strategy and establish a differentiated market position.

Erich Hickey
Chief of Staff/CIO
Green Family Office

Erich is the Chief of Staff/CIO for the Green Family Office. Erich has over 22 years of experience in the finance industry. Before joining the Green Family Office, Erich held high-level positions at The Haverford Trust Company, Drexel Morgan Capital Advisors, Inc., Spouting Rock Financial Partners, and Viking Investment Group.

Speakers

Michael Ouellette
President
Starboard Advisors

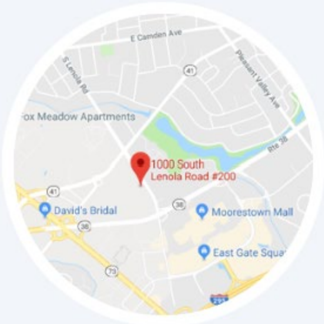
Michael Ouellette joined Starboard Advisors in January of 2022 and serves as the company's President. Prior to Starboard Advisors, Mr. Ouellette was a family office executive for 24 years and representing family assets of over $4 billion. Mr. Ouellette began his career with a four-generation family office based in Portland, Maine, serving as Executive Vice President and Treasurer of Dexter Enterprises, Inc. from 1997 to 2014. From 2014 to 2021, Mr. Ouellette served as CEO for Ten Mountain Capital, a two-generation family office based in Boston, Massachusetts.

Mr. Ouellette continues to serve as an independent director and trustee for multiple families and also serves on the board of directors for both publicly-traded and privately-held companies.

Through his work, Mr. Ouellette has helped families implement best practices for family governance, next-gen education, investment management, cash management, estate and tax planning, and charitable initiatives. Mr. Ouellette's direct work experience includes: establishing family office governance structures; managing daily operations and staff; investment committee work including implementing investment mandates, manager/consultant selection, and investment performance monitoring; trustee and trust administration for hundreds of trusts; due diligence and oversight for private companies and real estate holdings; estate administration and ongoing estate planning and wealth transfer strategies; periodic tax planning for individuals, LLCs, and trusts; private foundation management and charitable giving; and developing and implementing family education curriculum for next generations.

Contact us

Haefele Flanagan



Tall Oaks Corporate Center

1000 S. Lenola Rd.
Building 2, Suite 200
Maple Shade, NJ 08052

NJ Number: 856-722-5300
PA Number: 215-627-5150
Fax: 856-722-5395

STARBOARD ADVISORS
YOUR RIGHT OF WAY
A DIVISION OF KELLEHER FINANCIAL ADVISORS, LLC

bart@starboardadvisorsllc.com
mike@starboardadvisorsllc.com
rita@starboardadvisorsllc.com
hannah@starboardadvisorsllc.com

207.358.1200

2 Union Street, Suite 401
Portland, ME 04101

KELLEHER FINANCIAL ADVISORS

Kelleher Financial Advisors
100 Wall Street, Suite 804
New York, NY 10005

Phone: 212-232-5685
info@kf-advisors.com