Family Office Workshop

Portland Yacht Club
September 29, 2022

Agenda: Family Office Workshop

10:00am	**DOORS OPEN**	
10:00am	Refreshments are served	
10.15am	Bart Weisenfluh, Starboard Advisors	*Welcome!*
10.20am	Sean Kelleher, The Kelleher Family	*Honoring Intent*
10.40am	Travis Coley & Jon Cofsky, White Penny	*Your Story is Your Brand . . . Controlling Your Family Narrative*
11.10am	**BREAK**	
11.20am	Jim Geary, CFO, Glickman Family Office	*Engaging the Next Generation with Philanthropy*
11.45am	Bart Haag, CPA, Albin, Randall & Bennett	*Business Succession Planning and the Road Ahead*
12.15pm - 1.15pm LUNCH		
1.20pm	Hugh O'Donnell, True Equity	*An Update on the Private Equity Markets*
1.45pm	Ann Marie Liotta, CPA, Cohn Financial	*Protecting the Inheritance*
2.10pm	Neil Cataldi, Starboard Advisors	*Economic Update and Forecast*
2.30pm	**BREAK**	
2.40pm	Jon Block, Pierce Atwood	*State Residency Under a Microscope*
3.05pm	Kay Shah, Agreus Group	*What it Takes - Leadership in a Family Office*
3.30pm	Michael Ouellette, Starboard Advisors	*The Family Compound: Rules of the Road*
4.00pm	**RECEPTION - UPPER DECK!**	

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 holds 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 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.

Hugh O'Donnell
Founder
True Equity

Barton Haag joined ARB in 1996 and has been a principal with the firm since 2005. His career focus is primarily in providing financial accounting, income tax planning, and business advisory services for clients in the automotive and motorcycle dealership industries, and for closely held businesses, many of which are family owned. Bart has published several articles in various periodicals and has presented tax, estate planning, and automotive industry-specific seminars at national and state industry meetings. He is the Practice Leader for ARB's Automotive Services Group. Community Involvement include: Past Chairman, AutoCPA Group; Board of Directors and Past President, hear ME now!; Treasurer and Board of Directors, Princess Point Improvement Association; Board of Directors, SailMaine. Bart and his wife, Ilse, reside in Yarmouth, Maine, with their two children. He enjoys golfing, skiing, boating, and traveling with family and friends.

Barton D. Haag, CPA
Principal
Albin, Randall & Bennett

Speakers

Jim Geary
CFO, Glickman
Family Office

Jim Geary – CFO of Albert B. Glickman & Associates (family office) in Portland, Maine.

Prior to the Glickman Family Office, for 19 years Jim was the CFO at the Maine Community Foundation, a $660 million foundation in Ellsworth and Portland, Maine. As CFO Jim oversaw all aspects of the financial reporting system and was a key member of a small team of people who managed the $600 million investment portfolio for the Foundation.

Earlier in his career, he was a CPA at Arthur Young in Portland, Maine and the controller of Woodard & Curran, an engineer firm based in Portland. In his volunteer life, Jim is the Chair of the Finance Council of the Roman Catholic Diocese of Portland, member of the Board of Appeals and Conservation Commission in Southwest Harbor.

Jim received a B.S. in Accounting from the University of Southern Maine in Portland and an MBA from the University of Maine. Jim grew up in York, Maine and has lived in Southwest Harbor, Maine for the past 28 years with his wife.

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
Whitepenny

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.

Neil Cataldi
Managing Director
Starboard Advisors,
Former VP/CIO - Viking Family Office

Neil Cataldi joined Starboard Advisors in September of 2022 as Managing Director. Formerly he served as a Vice President and led the investment process for $250Million+ in holdings at the Viking Group, a family office in Cherry Hill, NJ. Mr. Cataldi has over 20 years of Wall Street industry experience across equities, options, alternatives, and Family Office governance. He began his career on the floor of the Philadelphia Stock Exchange where he worked for both TFM Investment Group and Goldman Sachs. He then worked as a derivatives strategist at Susquehanna International Group, generating stock and option trading ideas, mainly within the Consumer sector. Neil has also consulted for multiple private Family Offices managing a range of investments, including actively managed equity and fixed income portfolios, as well as the oversight and management of a large portfolio of hedge funds

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.

Jon Block
Residence Attorney
Pierce Atwood

Jon Block represents and advises clients with Maine, New Hampshire, and Massachusetts tax problems. Jon litigates tax cases at the administrative level and through all levels of the court system, advises clients on transactional and multistate tax issues, obtains advance rulings for clients, and does a substantial amount of legislative and government relations work in the tax area. Jon's substantive expertise in state and local tax encompasses corporate and individual income tax, business profits tax, sales and use tax, property tax, excise tax, transfer tax, and other state and local taxes. Jon also advises expanding and relocating companies on taking maximum advantage of available tax and economic development incentives. Jon's client base includes large, medium and small businesses as well as individuals.

Speakers

Ann Marie Liotta, CPA
U.S. Wealth Strategist
Cohn Financial Group

Ann Marie joined Cohn Financial Group as a Wealth Strategist and Producer. Ann Marie specializes in complex life insurance planning and specialized in Private Placement Life Insurance (PPLI). She works with high net worth families, individuals, RIA's and family offices throughout the United States. Prior to joining CFG, she worked at Lombard International for three years as their Head of Product Development and Wealth Structuring Services for the U.S. In her role at Lombard, she assisted internal and external partners with understanding private placement solutions and incorporating the solutions in existing and new wealth plans.

Prior to joining Lombard International, Ann Marie provided a full range of tax compliance and consulting services for individuals and families, where she headed up the Private Clients Services practice of Ernst & Young (EY) in Philadelphia. She practiced as a Certified Public Accountant for 23 years before joining the insurance industry five years ago. Ann Marie graduated Magna Cum Laude from Rutgers College School of Business.

Jon Cofsky
Co-Founder + Creative Director
Whitepenny

Jon is the co-founder and Creative Director of Whitepenny, heading both the strategy and design side of the firm. Additionally, Jon leads the project management team. Jon sets the strategic direction of Whitepenny and aids companies all over the world in strategy and design.

Contact us

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