

The power 25

PAM spotlights 25 influential people in the wealth management space

Pivate Asset Management has compiled a list of 25 prominent players in the wealth management and family office space.

PAM's wealth advisory editorial board nominated and chose the list of its leading peers and explained why each individual is making their unique mark in terms of thought leadership, education and philanthropy in an ever-changing industry filled with regulation, social media and a growing competitive landscape.

The advisory board chose based on the criteria that nominees excelled in thought leadership and levels of influence in their respective fields.

1 Angelo Robles

Robles started the Family Office Association, a single-family office networking group based in Greenwich, Conn. in 2008 and has since grown it into one of the most prominent single-family office associations globally. One board member said Robles is "a great conveyor and thinker who helped invent and re-invent the industry."

2 Antony Bugg-Levine

As CEO of Non-Profit Finance Fund, he was the first person at a big foundation to support impact investing, and was integral in launching the Global Impact Investing Network (GIIN).

3 Charlotte Beyer

As CEO of Institute for Private Investors, Beyer created a platform for private investors to share ideas. "Her focus on education and privacy has allowed the IPI to take its place as a leader and innovator for its members – attracting the wealthiest of families and providing them a unique opportunity to share knowledge and learn from like-minded individuals," a member noted.

4 Charles Lowenhaupt

Touted by one advisory board member as "one of the most knowledgeable and well-respected family office executives in the world," Lowenhaupt has been a champion for creating wealth management standards throughout the industry.

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5 Chris Galloway

Galloway, president and CEO at Okabena Company, a single-family office, is an active speaker in the space, unafraid to share best practices and speak about issues the SFO is currently facing.

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6 Chris Zander

As a partner of Evercore Wealth Management, Zander's background, knowledge and approach to his clients fosters an environment of trust, explained a board member. His clients know that their interests are at the forefront and that his ideas are structured to meet clients' needs first, regardless of the benefit to him or his firm.

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7 Jacqueline Valouch

Considered one of the top influencers in the private foundation space, Valouch is the vice president and charitable planning consultant for Fidelity Charitable. Throughout her many speaking engagements, Valouch's passion for teaching the next generation about philanthropy is making its mark in the industry, noted one member.

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8 Frank Ghali

Ghali, of Goldman Sachs Private Wealth management group, leads a 10-person practice that sits within the investment management division of Goldman Sachs with one of the largest books of business. A board member noted that Ghali hosts frequent 'think tanks' for his prominent client base in Silicon Valley, with the most recent one linking clients with the head coaches of the New York Jets and Giants football teams.

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9 Jay Hughes

As an attorney by trade and an author by calling, Hughes has written and spoken about the important issues that families face on an ongoing basis. An advisory board member commented: "A de facto priest or oracle; [Hughes] is still the single most influential voice in the family office community."

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10 Jean Brunel

An industry thought leader, Brunel joined GenSpring Family Office's Investment Advisory Center as chief investment officer; a visionary in terms of investment management, strategic asset allocation, macroeconomics and manager selection, according to one board member.

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11 Jed Emerson

The executive vice president of strategic development at Impact Assets has his hands full when it comes to impact investing, performance metrics and sustainable finance. Emerson is the originator of the term “blended value,” and has spent over two decades exploring how capital investment strategies may be executed to create multiple returns.

12 John Duncan

Duncan, principal at Duncan & Associates, has been the leading lawyer speaking and writing about regulatory issues facing the wealth management industry. One board member remarked: “Duncan was an early innovator to set up private trust company structures for family offices. To this day, this important mechanism is still used and he has been instrumental in working with state and federal regulatory agencies in the drafting of laws.”

13 Ken Kilroy

As a longtime single-family office head for a Hollywood family, Kilroy now is the CIO, Valgard Capital Partners, LLC & CEO at Trailhead Advisors, Inc. One board member commented: “He is a wonderful mentor and connector.”

14 Kevin Jones

Considered a leader in the social impact investing space, a board member explained: “Jones was the first to realize that we needed a forum to bring these key ideas into people’s consciousness.”

15 Nathan Troutman

As president of Troutman Investment Management LLC, he is helping restructure some of the foremost billionaires building process and approval structures for investment policy as well as for philanthropy.

16 Ron Cordes

Cordes is the co-chairman of Genworth Financial Wealth Management and one of the innovators and champions of the impact investing space. He serves on a number of non-profit boards involved in microfinance, social entrepreneurship and global economic development and truly has a passion for how to make a social change in a financial world, noted one board member.

17 Sara Hamilton

As founder and CEO of Family Office Exchange, Hamilton has linked research and thought leadership for families and advisors. She most recently co-authored the book *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times*, and serves on the executive education faculty of the University of Chicago Booth School of Business.

18 Scott Welch

The senior managing director, Investment Research & Strategy at Fortigent is frequently published in industry



journals and is a keynote speaker at financial services conferences. Welch, as a board member noted, identified the trend to independent, unconflicted wealth management early on and has remained a strong advocate.

19 Shannon Kennedy

The senior vice president and global director of sales, marketing and the fiduciary group of the wealth management group at Northern Trust is carefully segmenting the wealthiest families, while understanding that some do have SFOs and some don’t, and serving them accordingly, noted a board member.

20 Stephen Prozano

With a career spanning over three decades, Prozano, CEO of Silver Bridge Advisors, has been characterized as a leader; an integrator; an innovator and a change agent of what has become a global shift to comprehensive wealth management for the high-net-worth and ultra-high-net worth individual.

21 Tom Livergood

The founder and CEO of the Family Wealth Alliance continually brings the top wealth managers and family office executives to the table for information sharing. This year, Livergood launched the Alliance Security Council targeting the major safety and security threats that face ultra-high-net-worth individuals and families.

22 Maria Elena Lagomasino

Lagomasino has been at the helm of multi-family office GenSpring Family Offices as CEO since 2005. She has grown the firm to \$1.8bn under advisement, as the MFO has been chosen by more than 700 families to manage their multi-generational wealth.

23 Gordon Fowler Jr.

Fowler not only holds the title of president and CEO of the Glenmede Trust Co., but also acts as its CIO, responsible for investment strategy, fund management and research. Clearly a leading figure in investment strategy, according to a board member; Fowler has seen the development of numerous equity and asset allocation strategies.

24 Abby Raphael

Raphael, the executive director of The Redwoods Initiative, founded and created the truly unique program that targets next generation wealth holders about education on wealth preservation by tapping into their true passions.

25 Alexandra Lebenthal

Lebenthal is not only the President and CEO of Lebenthal & Company and its multi-family office Alexandra & James, but has now added bestselling author to her roster. She recently published *The Recessionistas*, a novel about a circle of New York City women whose lives were turned upside down by the economic downturn.