

# Rising stars

In its inaugural 'Rising Stars' list, PAM details the wealth management and family office industry's brightest emerging players

By Kristen Oliveri and Amber Morgan

## PATRICIA ANGUS

- Angus Advisory Group LLC
- Founder and CEO



A true leader in the field of family governance and inter-generational wealth,

Angus has worked exclusively with families of substantial wealth for the past two decades. Angus helps families live and give more productively through strategic planning, critical analysis and compassionate guidance. She spends a significant amount of time translating legal concepts and helping clients master the skills they need to manage complex legal and financial structures. Over the past year, she co-led (with Veris Wealth Partners) a series on Women, Wealth & Impact for a remarkable group of cutting edge women. She has also become an adjunct professor at Columbia University Business School, where she created and taught a course on Family Enterprise to MBAs and other graduate students.

## HAIG ARIYAN (TOP) AND CHIP PACKARD

- Deutsche Bank Wealth Management Americas
- Co-heads



Packard and Ariyan serve as co-heads of Deutsche Bank Wealth Management Americas. They lead a successful business comprising the US and Latin American Private Bank, and the US Private Clients division, offering a wide spectrum of sophisticated investment solutions to ultra-high-net-worth individuals, entrepreneurs, family offices, foundations and small to mid-size institutions. Co-heading the firm with \$140bn in assets under control, Packard and Ariyan also sit on the Global Asset & Wealth Management and Asset & Wealth Management Americas Executive Committees.



## JOHN BARRETT

- U.S. Trust, Bank of America Private Wealth Management
- Private client consultant and managing director



Known for his diplomacy and leadership with internal and external resources, Barrett has led successful teams of private client specialists in established and start-up organizations. At U.S. Trust, Barrett is a key point of contact in the delivery of integrated advice and service through client teams, and coordinates the relationship management process. He also serves as a member of the Financial Planning Association. In addition to advising his Connecticut and Westchester County clients on their philanthropic goals, Barrett has a strong personal connection to the not-for-profit world, and recognizes the empowering effect that philanthropic giving has for people who support organizations and causes they care deeply about. He is actively involved in Orphans' Heroes, a not-for-profit organization founded by his sister-in-law who saw the need to provide education, housing and physical and emotional support to children who have been orphaned and abused.

## JOHN BENEVIDES

- Harris myCFO
- President



Benevides provides vision as well as strategic and operational leadership in service to clients across the full suite of family office and investment services. He helps ensure clients successfully navigate the often complex issues high wealth brings. He has helped Harris myCFO® become recognized for offering one of the country's most comprehensive suites of services tailored to this unique market. Across his career, Benevides has also advised c-suite executives at

## METHODOLOGY

PAM's wealth advisory editorial board (visit our website for a full list, at [www.pammagazine.com](http://www.pammagazine.com)) nominated a list of its leading peers, based on a criteria of leadership abilities, educational initiatives and philanthropy. The advisory board's final decision was also based on individuals' levels of influence in their respective fields.

the world's leading private wealth institutions, on site, in more than 40 countries. He is a featured speaker and presenter, and has been quoted in *Barron's*, *Financial Times*, *Wall Street Journal*, *Australian Financial Review*, *Family Wealth Report*, *Private Wealth*, *Research*, and more. He is the immediate past chairman of the Executive Committee for the 2,700 member Family Business Network of the Young Presidents' Organization (YPO/WPO).

## JENNIFER CHRISTIAN MURTIE

- Federal Street Advisors
- COO



Murtie improves the functionality of the client reporting system at Federal Street Advisors, and is building a more sustainable business practice by reducing client trading and custodial costs, improving internal processes and executing operational best practices. In the fall of 2007, she took a six-week paid sabbatical from Federal Street Advisors to do business strategy consulting for a social enterprise in Ghana that manufactured and sold water filtration systems. She is the winner of the Silverman Business Plan Competition, awarded for her business proposal to create an ecotourism consulting company focused on sustainable economic development in Africa. She currently serves on the Advisory Council of The Haiti Fund and the Investment Committee of the Fair Food Fund – Northeast.

## JONATHAN CRYSTAL

- Crystal & Company
- Executive vice president



In addition to his role as an executive in his family's business, Crystal has been focusing his attention on developing the firm's capability to serve what he calls the "global wealthy" – families whose assets and activities span multiple continents.

In addition, he is building on his firm's heritage serving a wide range of corporations, financial institutions and affluent families to deliver a unique model of integrated risk management and insurance services to the entirety of the Family Enterprise, encompassing closely-held businesses, family offices, private trust companies, family-funded ventures and private foundations. Crystal has presented to audiences across the country on topics of family risk management and participates actively in a number of organizations serving the needs of family enterprises, including Family Firm Institute, Family Office Association, Institute for Private Investors and Family Office Exchange. Active in the community, Crystal serves as an officer and member of the Board of Trustees of The Jewish Museum, the Board of Friends of Mount Sinai and on the Advisory Board of the Mount Sinai Adolescent Health Center.

#### GRETCHEN DAVIDSEN

- Fidelity Family Office Services
- Vice president

Davidson is in charge of the firm's Insights & Connections program.

As a member of the senior team, she works exclusively with single-family offices, select RIAs and wealthy families in a consultative fashion to provide insights and best practices, referrals to third party professionals, connections to a peer network and access to industry associations. She provides guidance by connecting wealthy families and family offices to valuable research, best practices and each other, and is focused on helping family office clients and prospects share their thoughts on direct investment opportunities in various industries, including oil and gas, technology, media and telecommunications and real estate.



#### COVENTRY EDWARDS-PITT

- Ballentine Partners
- Managing director and chief wealth advisory officer

Edwards-Pitt specializes in helping clients navigate intricate family dynamics to develop plans that reflect their family's values and goals. In her role, Edwards-Pitt is responsible for the firm's entire wealth advisory practice and for the management and thought leadership of the firm's wealth advising practice, ensuring outstanding advice and service across the firm's 100-plus client family relationships. She also leads several of the firm's large family client engagements and manages all



aspects of her clients' financial affairs, including their investment portfolios, tax and estate tax planning, insurance needs, philanthropic planning and liquidity planning.

#### JARED FELDMAN

- Anchin Family Office
- Partner

Feldman works well with the client's existing team of investment, legal and insurance advisors, to provide the best combination of service and advice in the marketplace, resulting in fewer worries, better decisions and ultimately, greater overall advice. He focuses on the accounting, tax and business issues his clients face, including the ever-changing tax and regulatory landscape, estate planning, philanthropic and next generation planning and business consulting. Feldman also acts as a personal CFO to a broad range of his clients. For both single- and multi-family offices, Jared and the Anchin team of seasoned professionals handle day-to-day functions such as bill payment services, tax reporting and payroll, as well as long-term tax planning and personal and business accounting issues. Working with other partners in the firm and other professionals, he provides seamless service in regards to philanthropic gifting strategies, wealth transfer to future generations, internal control reviews and risk management.



#### JEFFREY FERRARO

- Fieldpoint Private Bank & Trust
- Managing director

When Ferraro transitioned into private banking in 2000, he became a top producer within three years, sustaining the role through bank mergers, acquisitions and market fluctuations. While at The Fleet Private Clients Group, he ranked consistently in the top 10% of the firm's advisors, developing his practice advising wealthy families, corporate executives and business owners on wealth planning, asset allocation, investment selection, banking, lending and wealth transfer strategies. At Fieldpoint, Ferraro is integral in making sure that the business serves as both a multi-family office and wealth management firm, often working with other advisors in the industry without a conflict of interest. He also served for 10 years as the executive director of the Jeannine Damiani-Jones Memorial Foundation, a 9/11 foundation that was established in remembrance of a fallen friend and fellow Villanova alumnus.



#### ROB FRANCAIS

- Aspiriant
- Co-founder and CEO

Under Francais' leadership and vision, Aspiriant has grown into the third largest independently owned wealth management firm in the country. He spends most of his time driving the firm's vision and expanding its culture into new markets. Over the course of his career, Francais has launched several successful businesses and business lines within larger firms; most recently, he was the co-founder and CEO of Quintile Wealth Management, one of the predecessor firms that merged to form Aspiriant in 2008. For this upcoming year, Francais plans to focus on driving the firm's culture, growing the business organically and looking for its next "fold in" candidate.



#### JONATHAN JUSTICE

- U.S. Trust, Bank of America Private Wealth Management
- Senior vice president and private client advisor

Justice combines an analytical and personal approach when working with clients to create their wealth plan. He and his team are spending a great deal of time assisting clients in moving cash from the sidelines into the capital markets and in structuring credit solutions in a still-favorable interest-rate environment. Justice is also well versed on the appraisal, disposition and transfer of tangible assets and provides clients with advice on managing art and collectibles as assets. Before a career in wealth management, he served at Sotheby's Trusts, Estates and Appraisals Division in New York, where he played a key role with appraisals and collection sales, including those of Bill Blass, June Carter and Johnny Cash and Richard Avedon. He is now active in working with art professionals and collectors in leveraging their artwork to use for other investment and business purposes.



#### JOE LONSDALE

- Addepar
- Founder and chairman

Lonsdale has been an active chairman at his founding firm, Addepar, helping the team prioritize its deployments and scale effectively as it gets hundreds of inbound notes from institutions and wealth managers from all over the world. He is the chairman of both ONEHOPE Inc, a charity-focused wine

