



Wealth Management NextGen Summer Seminar—New York

Deutsche Bank

Management and Speaker Biographies

David Addison is a Director with Deutsche Bank for the past 24 years, the last 8 as a Structured Lender in the Private Bank. Mr. Addison's career at Deutsche Bank spans multiple divisions and roles, including stints in risk and finance functions in DWS, as well as residential lending within the Private Bank. As a Structured Lender, Mr. Addison works closely with coverage teams to provide lending solutions to ultra-high net worth clients across the product platform, with specific experience in commercial real estate, private stock loans, insurance premium finance, art, aircraft, unsecured, and residential real estate mortgages. In addition to his lending responsibilities, Mr. Addison is responsible for all workout situations related to troubled residential real estate loans, negotiating solutions appropriate for both the client and bank that limit potential credit losses. Mr. Addison received a B.A. in History and Political Science from Guilford College, and an M.B.A. from Fordham University's Gabelli School of Business.

Carina Bartozzi is a Director and Head of One Bank Solutions for Deutsche Bank Wealth Management (DBWM) in the US. In this role, she focuses on client coverage for select investment opportunities and origination. The One Bank Solutions team oversees cross-divisional partnership opportunities between our largest and most sophisticated Wealth Management clients and our Corporate Bank and Investment Bank. The team bridges the services and deal flow with the needs and interests of institutional wealth clients covered out of DBWM, creating a virtuous circle of deal origination, advisory and syndication opportunities. Ms. Bartozzi joined Deutsche Bank in August of 2021 and was a Director in Equity Capital Markets in Investment Banking with a focus on SPAC and de-SPAC transactions across different sectors. Prior to that she worked in London and New York in Equity and Debt Capital Markets. In 2023 she moved to Wealth

Management to oversee One Bank Solutions US. Ms. Bartozzi holds a LLB in Law from King's College London and a LLM Master in Banking and Finance Law. She holds FINRA Series 7, 63, and 79 licenses.

Francesca Boschini is Director - Head of International Wealth Planning & Head of Insurance Solutions for the Americas at Deutsche Bank Wealth Management. Ms. Boschini is based in New York and is in charge of Deutsche Bank Wealth Management Americas cross-border and international wealth planning practice and of its insurance planning solutions platform. When working directly with clients Ms. Boschini provides technical assistance on wealth planning and insurance planning matters to U.S. and international families. She works to develop and execute solutions for the complex global wealth preservation, estate and insurance planning needs of high-net-worth and ultra-high-net-worth clients. Ms. Boschini has over 25 years of experience in the wealth planning field. Prior to joining the firm, she worked at RBC Wealth Management for 18 years, as head of its U.S. & International Wealth Planning team and served as a Director on the RBC Delaware Trust Company Board of Directors. Ms. Boschini earned her civil law degree and was awarded the academic degree of Doctor of Jurisprudence (J.D.) from the University of Bologna School of Law in 1997. She earned her Master of Laws degree (LL.M.) in 2002, specializing in tax and estate planning, from the University of Miami School of Law. She was an honors recipient of the 2000 Garcia-Amador Scholarship and also received the Certification in International Tax from the same university. She has earned the "Trust and Estate Practitioner" designation (TEP) from the Society of Trust and Estate Practitioners. TEPs are internationally recognized as experts in their field, with proven qualifications and experience. Ms. Boschini is a frequent speaker at international trust and estate planning conferences globally, and has authored several articles published in leading professional journals. She is fluent in English, Italian and Spanish with a working knowledge of Portuguese. Ms. Boschini is an active member of the Society of Trust and Estate Practitioners (STEP), of the

Institute for Family Governance (IFG) where she is an Advisory Board Member, with a focus on working with the Next Generation on Family Governance and Wealth Education, enhancing the role of women in finance and fostering the development of young female leaders.

Ms. Boschini has won numerous awards during her career. Most recently, Citywealth awards and accolades including: member of Citywealth's Leaders List, shortlisted for the 2019 Powerwomen award for Best Female Advisors & Managers in the U.S., International Powerwomen Top 100 ranking for 2019, 2020 Powerwomen Editor's Choice Award and New York Bronze Banking Award, Top 20 Women in Private Wealth Management 2020, Top 50 Wealth Management Advisors 2020, Top recommended NY Wealth Management Professional Advisors 2021, Top 100 Global Wealth Management Advisors 2022, Top 100 International Powerwomen 2024. Citywealth's Leaderslist is a peers-led-contest that invites advisors and clients within the global wealth management industry to vote for their top advisors globally.

Whitney Call has a master's degree in clinical mental health counseling and spent several years serving as a clinical mental health counselor (CHMC) providing child and family therapy. She is currently bringing that knowledge and background into the nonprofit world, where she serves as a Senior Program Associate in early childhood for a large grantmaking foundation serving the intermountain West. She is the board chair for 2 large family foundations doing work in early childhood education and mental health, food insecurity, and affordable housing. She also serves on 2 outside boards in early childhood mental health and education. Additionally, Ms. Call cares deeply about empowering women and creating a more equitable world. Ms. Call is passionate about values-aligned investing and actively invests through a gender and equity lens to utilize her capital to empower diverse founders and drive change. She is active in the philanthropic ecosystem, especially women's donor networks. She is also an active angel investor.

Ms. Call lives in Salt Lake City, Utah with her husband and three daughters (ages 12, 9, and 6). She has a household of animals, especially dogs since she is a puppy raiser for Guide Dogs for the Blind and fosters litters of puppies. In her free time, she enjoys travel, outdoor adventures, foodie expeditions, and many creative endeavors.

Adrian Cox is a strategist on the Thematic Research team and is currently focusing on the implications of Artificial Intelligence for investors, enterprises and society. He joined Deutsche Bank in 2009 and held senior leadership roles in Communications in London and Sydney before joining DB Research. He previously spent a decade covering finance and economics as an award-winning journalist and editor at Bloomberg News and the Financial Times in London, Brussels and New York. He is a graduate of Cambridge University and has an MBA from City University in London.

Alessandra DiGiusto is head of Corporate Social Responsibility Americas and Executive Director of Deutsche Bank Americas Foundation. She oversees Deutsche Bank's philanthropic strategy and grantmaking programs in the region. Before joining the Foundation as CAO in 2003, Ms. DiGiusto created and led the Strategy, Communications, Events and Marketing groups of Deutsche Bank Private Wealth Management in the U.S. She also co-developed the signature Wealth with Responsibility program, overseeing the philanthropic and family advisory relationships of the Private Bank. Prior to this position, s. DiGiusto supervised the integrated marketing unit for DB Alex. Brown Brokerage and Global Private Banking and was head of Global Business Development at Bankers Trust Private Banking. Ms. DiGiusto received a B.A. from Oberlin College and an M.B.A. in finance and marketing from the Stern School of Business at New York University. She received her Executive Coaching Certification at Columbia University and coaches pro bono emerging nonprofit leaders. Ms. DiGiusto is on the Executive Board of NYC Workforce Funders, Executive Board of the Bronx Museum, Jobs First NYC's Green Economy Network, Advisory Board of the Mosaic Fund of ALAANA organizations and the New York Foundation for the Arts Advisory Council. Ms. DiGiusto was Vice Chairman of Americans for the Arts and Vice Chairman of the Arts and Business Council NY. She served on Oberlin College's Alumni Trustee Search Committee and was a former member of Oberlin College's Alumni Executive Board, Nominations and Admissions Advisory Committee. Ms. Digiusto was one of the early founders of the Women on Wall Street Conference. She is a former trustee of Greenhope Housing Services, the West Side YMCA and the Executive Board of PS 199.

Max Disney has been a board member of the Roy and Patricia Disney Family Foundation for the last 15 years, during which he has seen and helped shape the foundation through three generations. Mr. Disney's experiences as a family office and family foundation member have given him practical experience and insight into how families can work together to create effective results for themselves and the communities they serve. Beyond his philanthropic background, Mr. Disney has advised, founded or funded numerous tech startups. His major areas of focus remains in working with developing countries, with a focus in Africa, to provide basic services to marginalized communities around the world at scale as well as the world of entertainment.

JP Egui is a Director and Head of Investment Management for Latin America Private Bank. His team partners with private bankers to deliver DB's investment offering out of both Swiss and US platforms. With the investment managers' (IM) presence in NY, Miami, Geneva and Zurich, clients are given optionality of jurisdiction and complementary cross-asset capabilities including liquidity solutions, actively managed portfolios, direct access to publicly traded markets, private capital raises and select syndication opportunities. Previously, Mr. Egui ran public Capital Markets Sales and One-Bank Solutions (cross divisional partnerships) for DB's wealth management arm in the US.

Mr. Egui joined DB in August of 2019 from Compass Group (now Vinci Partners), a Latin American-focused asset manager where he ran EM and distressed debt sales for global institutional investors. Prior to his sales role, he focused on EM and HY credit research, credit trading, fundraising and business development.

Mr. Egui holds an M.B.A. from the NYU Stern School of Business and a B.S. from Boston College. He holds FINRA Series 7, 9, 10, 24 and 63 licenses.

Neal Elkin is a Managing Director for Deutsche Bank Wealth Management and the Head of Discretionary Portfolio Management for the Americas. He serves as member of the Deutsche Bank Trust Company, National Association Board of Directors and the Investment Committee of the Deutsche Bank Americas Pension Plan

He has over 30 years of industry experience. Most recently, He was a Managing Director and Senior Investment Strategist for Bank of America's Private Bank in New York. Prior to this, Mr. Elkin was a Managing Director and Client Portfolio Manager in JP Morgan's asset management division. In addition, He served as President and co-Founder of Real Estate Analytics, LLC (REAL), a firm dedicated to delivering structured products and derivative solutions to the commercial real estate asset class.

Mr. Elkin graduated with a Bachelors of Science in Finance from the McIntire School of Commerce at the University of Virginia in 1987. He held FINRA 7, 3 and 63 licenses.

Emy Kane is the Executive Director and founding team member of Lonely Whale, an award-winning nonprofit dedicated to preventing ocean plastic waste. Informed by nearly a decade of experience in communications and impact strategy, Ms. Kane's work is inspired by her belief that we all have a role to play in solving our greatest social and environmental challenges and that storytelling is a powerful tool to advance impact and empathy. Across her career, Ms. Kane has defined and developed programs that help organizations unlock their purpose and deepen community engagement, weaving their efforts into culture through unique partnerships and collaborations. She has worked across a spectrum of brands including the UN, TOM FORD BEAUTY, The Estée Lauder Companies, Tommy Hilfiger, LiveNation, ATTN:, and Bacardi Limited.

Jasper Lau is the Founder and CEO of Era, a global investment firm backed by leading closely-held family enterprises across 19 countries and 25 industries. Era harnesses the collective knowledge, corporate intelligence, and strategic capital of the firm's families to build and back a new era of technology companies that are poised to solve society's greatest industrial challenges. Previously, Mr. Lau co-founded and led 8090 Partners, a private partnership of 20 industry-leading families and self-made entrepreneurs. Seeded by a multi-billion dollar family office, Mr. Lau launched 8090 to invest in growth-stage technology companies and other opportunistic transactions.

John Lin is a Vice President in Deutsche Bank's TMT New York team, focusing on Space sector coverage. Deutsche Bank's Space sector team provides a broad range of investment banking advisory and capital market services, in public and private markets, to clients globally. Mr. Lin has over 10 years of experience in finance and investment banking, advising clients on M&A, debt and equity raising transactions. Select transactions while at DB include SES' €4.6bn acquisition of Intelsat, AST SpaceMobile's \$1.4bn de-SPAC, Holicity's \$275m IPO and Astra's \$2.1bn de-SPAC. Mr. Lin received a BS in Economics from the Wharton School of the University of Pennsylvania and an MBA from Carnegie Mellon University.

Matthew Luzzetti is Chief US Economist and Head of US Economic Research at Deutsche Bank in New York. is a panelist for the US Monetary Policy Forum (USMPF) and Senior Vice President for the Forecasters Club of New York. His research has appeared in several books on economic policy and in refereed macroeconomics journals.

Mr. Luzzetti holds a Ph.D. in Economics from the University of California, Los Angeles. While at UCLA, he worked at the U.S. Department of the Treasury in the Office of Financial Research. Prior to graduate school, he spent two years as a research analyst in the macroeconomics department at the Federal Reserve Bank of Philadelphia.

Sean Magee is a Managing Director, Head of Investment Management overseeing the domestic U.S. jurisdiction at Deutsche Bank Wealth Management. He is responsible for the oversight and implementation of investment solutions for ultra-high-net-worth clients, family offices, corporate clients, insurance companies, endowments and foundations. He is the Co-Head of the Investment & Trading group, a voting member on Deutsche Bank's U.S. Fixed Income Strategy Group and serves on the firm's Americas Regional Investment Committee. He is also a member of the Private Bank America's Executive Council and the Central Europe & United States Investment Leadership Council.

Prior to his current role, Mr. Magee was the Head of Advisory & Sales for the Americas region, overseeing investment coverage for the US and Latin America. Before that, he was a Senior Portfolio Manager

within Deutsche Bank's discretionary portfolio management arm, specializing in the design and management of investment portfolios for high-net-worth individuals and institutional investors, both domestically and internationally. Before joining Deutsche Bank in 2005, he worked for Merrill Lynch & Co. as an advisor to high-net-worth individuals and family offices.

Mr. Magee earned a B.S. in Finance from the University of Rhode Island and M.B.A. in Finance from Fordham University. He is a member of the Fixed Income Analysts Society, Inc. and the Investment Management Consultants Association. He holds the Certified Investment Management Analyst (CIMA®) designation and has earned the series 7, 9, 10, 24 and 66 registrations.

Paul Maley is the interim CEO of Deutsche Bank in the Americas, based in New York. Concurrently, he serves as Global Head of Trust and Securities Services (TSS) and Regional Head of the Corporate Bank in the Americas. With over 25 years of experience at Deutsche Bank, Mr. Maley has held a wide range of roles across various geographies and responsibilities. Most recently, Mr. Maley spent nearly a decade in London where he held various senior level positions, including Head of the Corporate Bank for the United Kingdom and Ireland (UKI), Chief Operating Officer (COO) of Global Transaction Banking, and Global Head of the Business Solutions Group (BSG) where he helped lead strategic initiatives across the firm's investment banking franchise. Early in his career, Mr. Maley worked across Equities and Fixed Income Derivatives businesses in London and New York, where he served in a variety of client facing roles. In 2010, he moved to New York to help revitalize the Listed Derivatives for the Americas. Mr. Maley began his career with Deutsche Bank in Frankfurt, Germany, in Fixed Income Derivatives business. Mr. Maley is a graduate of Brunel University of London with a degree in Electrical and Mechanical Engineering.

Gary Marzolla is a Managing Director in charge of Fiduciary New Business Development for Deutsche Bank Wealth Management in the U.S.

Mr. Marzolla's background is in trust and estates, serving as a Senior Trust Officer for more than 15 years. Prior to joining Deutsche Bank in 1997, he was Director of Marketing and Sales for the Global Trust & Investment Division of Chemical Bank's Private Banking Group prior to the merger between Chemical

and The Chase Manhattan Bank, now J.P. Morgan Chase. He began his career at Manufacturers Hanover Trust Company in 1975.

Mr. Marzolla has presented seminars on wealth transfer planning, trust and estate administration and the role of a corporate fiduciary while serving in his positions within personal trust departments. He has held memberships in the Estate Planning Councils of Rockland County, Westchester County and New York City. He has also attended numerous New York State Banking Association schools.

Mr. Marzolla earned his B.A. in History from Fairfield University, his M.B.A. in Finance and Marketing from Fordham University and attended Fairfield University's Graduate School of Education.

Sam Matthews is a Vice President and Portfolio Manager for Deutsche Bank Wealth Management.

Prior to this role, Mr. Matthews was Head of the Chief Investment Office for Deutsche Bank Wealth Management Americas and was responsible for delivering market strategy and investment insight for ultra-high-net-worth clients. He also worked closely with portfolio managers, product specialists and private bankers.

Mr. Matthews joined Deutsche Bank in 2009 as a member of the Portfolio Management team based in London and has managed investment solutions for domestic and international high-net-worth clients, family offices and institutions since 2011.

Mr. Matthews graduated from the University of Kent in the United Kingdom with a Master's Degree in International Business Management & Economics as well as a Bachelors (Hons) Degree in Politics & International Relations. He is also a member of the CFA Society of the UK.

Patrick McGinnis, dubbed a “pop entrepreneur” by New York magazine, Patrick J. McGinnis is a venture capitalist, bestselling author, and creator of the hit podcast FOMO Sapiens.

He coined the term FOMO (Fear of Missing Out) and its lesser-known twin, FOBO (Fear of a Better Option), in a 2004 article at Harvard Business School. FOMO has since been added to the dictionary, and FOBO was the subject of Mr. McGinnis' popular TED Talk “How to Make Faster Decisions.” His work on FOMO, FOBO, and decision-making has been covered by the New York Times, Le Monde, FT, and El País.

The author of *The 10% Entrepreneur: Live Your Startup Dream Without Quitting Your Day Job* and *Fear of Missing Out: Practical Decision-Making in a World of Overwhelming Choice*, Mr. McGinnis is currently the brand ambassador for Latin American tech titan MercadoLibre's award-winning “Fear of Missing

Audience” campaign. He also appears in the cautionary crypto documentary *This is Not Financial Advice*, which premiered at the Tribeca Film Festival.

Mr. McGinnis' passion lies in harnessing the power of words to elevate humanity. In that spirit, he serves on the boards of Bridge USA, a campus-based youth movement fighting political division through dialogue, and the Planet World Museum in Washington, DC.

A graduate of Georgetown University and Harvard Business School, Mr. McGinnis has visited more than 115 countries and is fluent in Spanish, Portuguese, and French.

Deepak Puri is a Managing Director and Chief Investment Officer for Deutsche Bank Wealth Management in the Americas. In his role, he Co-Chairs the Americas Regional Investment Committee, the management team responsible for investment strategy and asset allocation for discretionary and advisory portfolios in the Americas; and is a voting member on the Global Multi Asset Investment Committee, which formalizes and establishes the global house view.

Before being named CIO, Mr. Puri was the Head of Discretionary Portfolio Management in the Americas at Deutsche Bank Wealth Management and previously served the firm in various positions within the Portfolio Management, Investment Strategy and Global Manager Research Groups. Prior to joining the Bank in 2004, he was a Senior Consultant in the Investment Advisory Services Group at Ernst & Young LLP and worked in various sales roles for PNC and Fleet National Bank.

He is widely published and has been quoted in various mainstream and financial publications, including the Wall Street Journal, Financial Times, CNN Business, Business Insider, Barron's, Bloomberg and Reuters to name a few. He also frequently appears on television and has been featured on CNBC, Yahoo Finance and Bloomberg.

Mr. Puri earned his B.Com (Honors) in Business Management from University of Delhi and has an M.B.A. in Finance from Seton Hall University. He is a CFA Charterholder, a Member of the CFA Institute and a Member of the New York Society of Security Analysts. Mr. Puri also holds the EFFAS certified ESG Analyst (CESGA) designation..

Susan Rounds is a Director and Head of U.S. Wealth Planning for Deutsche Bank Wealth Management – Americas.

Ms. Rounds specializes in providing services and solutions to clients in the areas of tax and estate planning, business succession, risk management, philanthropy, family governance, intergenerational wealth transfer, and legacy planning. In a career spanning over 25 years, Ms. Rounds has advised ultra-high-net-worth individuals, families, and privately-held business owner clients during her tenure in Big Eight Accounting, global financial institutions, and private legal practice. Ms. Rounds was inducted into the NAEPC Estate Planning Hall of Fame® Class of '22.

As a national speaker, author, and commentator, her articles have been featured in leading publications such as *Trusts & Estates Magazine*, *The Journal of Practical Estate Planning*, and *The Journal of Private Wealth Management*. Ms. Rounds makes frequent presentations at national seminars and Estate Planning Councils across the country.

Ms. Rounds sits on the Editorial Board for *Opportunity Zone Magazine* and has been named as one of the Top 25 Opportunity Zone Influencers in the country for the past 5 years. She recently joined the Executive Committee for the Los Angeles branch of the Society of Trust and Estate Professionals (STEP) and previously served as a board member for the National Association of Estate Planners and Councils, and as Editor for the NAEPC Journal of Estate and Tax Planning.

Teaching highlights include Federal Estate and Gift Tax at the University of Georgia School of Law, Federal Income Tax and Principles of Accounting at the University of Georgia Terry College of Business, and all sections for the National CPA Examination, including Financial Reporting; Income Tax and Regulatory Reporting; Business Law; and Audit. She also served as a faculty member for the NYU Summer Institute on Taxation.

Formal degrees and designations include a BBA in Accounting, cum laude, from UT El Paso, a Juris Doctor from the University of Georgia, and an LL.M. in Taxation from Emory University School of Law. Ms. Rounds passed the comprehensive four-part CPA exam on the first sitting and is a registered TEP (Trusts and Estates Practitioner) and earned the STEP Advanced Certificate in Cross-Border Estate Planning. Most notably, Ms. Rounds is an Accredited Estate Planner® (Distinguished).

Blaire Sacks is Art Project Manager and manages the Deutsche Bank Americas art collection for the past 10 years.

Ms. Sacks is part of the global Art & Culture division, which oversees the world's largest corporate art collection, related programming and employee engagement.

Ms. Sacks has a B.A. in Art & Visual Culture from Bates College.

Sarah Sclarsic is a Founding Partner at Voyager. She has been building and investing in transformative technology companies since 2009 and brings expertise in mobility, biotech, food and materials production, and carbon removal. Prior to Voyager, she co-founded car-sharing firm Getaround and served as the founding business director of Modern Meadow, the world's first company making bio-fabricated leather. Ms. Sclarsic is a technical advisor to Frontier, the \$1B fund to purchase carbon removal. Ms. Sclarsic is a graduate of Harvard and of MIT, where she researched atmospheric carbon removal technologies. She lives in New York City.

Ed Sibilía is the Head of U.S. Capital Markets Sales for Deutsche Bank Wealth Management in the Americas, where his team is focused on client coverage for investment opportunities in equities, equity derivatives, fixed income, foreign exchange and structured products.

Capital Markets Sales in an integrated team of sales trader suited to provide clients with institutional caliber markets dialogue and execution capabilities on DB Americas broker-dealer platform. The team shares observations and identifies tactical trading ideas, market dislocations as well as secular shifts in market direction.

Mr. Sibilía has +30 years of Wall St. experience and joined DB in October of 2021 after +6 years with Credit Suisse Securities LLC, where he was Head of Equity Derivatives Trading for the Wealth Management division, focusing on idea generation, strategy, trading and sales.

Mr. Sibilía has also spent time on trading desks at Morgan Stanley, Bank of New York, and Donaldson, Lufkin & Jenrette.

Mr. Sibilía graduated from NYU Stern School of Business. He holds FINRA licenses 4, 7, 9, 10, 24, 55, and 63.

Erik Soderberg is Head of U.S. Government & Public Affairs and Global Head of Geopolitical Affairs for Deutsche Bank, based in New York. Prior to joining Deutsche Bank, Mr. Soderberg worked at Credit Suisse, where he managed Capital & Liquidity Risk Management for the Global Markets group, and Morgan Stanley, where he held positions as Deputy Head of Liquidity Risk Management and Head of the Firm's Credit Risk Capital program. His prior experience includes roles in trading and risk management. He is a CFA charter holder, has a BA in Economics from Lehigh University and an MBA from the University of North Carolina at Chapel Hill.

Jacqueline Valouch is the Head of Wealth Planning and Philanthropy for Deutsche Bank Wealth Management based in New York. She leads a team comprised of in-house tax, trust and estate attorneys, and certified public accountants and together, they advise clients in areas such as estate planning, tax planning, life insurance, art collections, philanthropy, and next-generation wealth education, including a focus on international and cross-border wealth planning. They also work closely on the estate and trust administration needs of wealthy families.

Ms. Valouch has over 20 years of experience in the wealth planning area. After nearly a decade in private practice, she joined Fidelity Charitable where, for 15 years, she led a team of charitable planning experts, and advised individuals, families, and their advisors on how to incorporate charitable giving into their long-term planning goals.

Ms. Valouch has been featured as a subject matter expert at numerous conferences and panels on a variety of charitable planning topics. She holds a B.A. from the State University of New York at Albany and a J.D. from New York Law School, where she served as an adjunct professor of law for the LL.M., in Taxation program, teaching Charitable Organizations. Ms. Valouch sits on the Board of Directors for the Armory Foundation, is a member of the New York State Bar Association, Trusts & Estates Law Section, Charitable Planning Committee, is on the Executive Committee of WorkingNation, serves as a Leadership Advisor for Grace Farms Foundation and is also Co-Chair of the Lincoln Center Planned Giving Advisory Committee.

Anthony P. Valvo is a Managing Director and Head of Deutsche Bank Private Bank - US. He is also a Chair of the Deutsche Bank Wealth Management US Executive Council.

Mr. Valvo has a long track record of success as both as a lender and a leader. He joined Deutsche Bank from Bank of America Private Bank, where he was a Managing Director and Market Sales Executive, responsible for the New York City Metro market. Previously, he held senior lending roles at PNC, Barclays and Citigroup.

Mr. Valvo earned his B.A. in Economics and Communications from City University of New York – Brooklyn College. He holds his Series 7, 24 and 66 licenses.

Wendy Wecksell is an impact-driven leader, relationship expert, and founder of WxL Partners, a highly specialized executive coaching company that teaches "The EQ of Wealth" — a relational training focused on emotional IQ that teaches you how to earn trust, drive influence, and unlock impact among UHNW families. With a career spanning almost 20 years, Ms. Wecksell has worked directly alongside Oscar-winning icons, world leaders, visionary founders, and audacious philanthropists. She's partnered with UHNW individuals, families, and brands throughout her career from Morgan Stanley, Milken Institute's Strategic Philanthropy, KPMG, American Express, Impax Asset Management, Chanel, NYU, The Sundance Institute, Tribeca Festival, (RED), Samueli Foundation, George Kaiser Family Foundation, Schusterman Family Philanthropies, Long Angle, Galaxy Gives, Founders Pledge, and SF-based social club The Battery. As a 21/64 Certified Advisor with a clinical foundation in Gottman Method Couples Therapy, Ms. Wecksell has the unique skills and lived experience to address the emotional and relational challenges that often accompany wealth, family, and impact.

Shelley Wong is a Director and Senior Investment Manager in Deutsche Bank Wealth Management's New York office. She is responsible for the oversight and implementation of customized investment solutions for ultra-high-net-worth clients and family offices.

Ms. Wong joined from HSBC Private Bank, where she was a Senior Investment Counselor, delivering multi-asset advisory to high-net-worth and ultra-high-net-worth clients across traditional and alternative investments. Prior to HSBC, Ms. Wong was a Director of Research and Business Development at Novus Partners, a fast-growing portfolio intelligence platform. In this capacity, she worked closely with CIOs and investment teams at pensions, endowments & foundations, and family offices on portfolio construction and manager selection. Prior to Novus, Ms. Wong was a Director at Barclays Capital within the Hedge Fund Consulting group, where she acted as a thought partner and advisor to hedge fund founders and portfolio managers across a wide range of strategic projects. In this role, she authored more than 15 in-depth thought pieces on hedge funds, and her work had been cited in WSJ, Reuters, FT and other prominent financial publications.

Ms. Wong holds an MBA from Columbia Business School and a BS from Boston University Questrom School of Business.

Michael Zeuner capacity, he had responsibility for the leadership and management of GenSpring's network of 10 family offices in the United States, that firm's key advisory practices, and its delivery of a high-quality client experience.

In addition, he was a member of the firm's Operating Committee. Before joining GenSpring, Michael was managing director and global head of Wealth Solutions at JP Morgan Private Bank. As a member of the executive team, he had responsibility for strategic planning, branding, marketing and specialized advisory services (family governance, philanthropy and fine art wealth management) for the worldwide private bank.

A management consultant by training, Michael led projects in the financial services area for both Andersen Consulting (now Accenture) and Booz, Allen & Hamilton. He joined Chase Manhattan in 1995 as vice president at the investment bank and moved to the private bank in 1997 to head up strategy and marketing worldwide. JP Morgan and Chase merged in January 2002.

Michael graduated from Brandeis University, (B.A.) and earned an M.B.A. from the University of Chicago.