



**TFOA**  
*Serving Single Family Offices Since 2007*

**UTD**  
THE UNIVERSITY  
OF TEXAS AT DALLAS

# Single Family Office Symposium

APRIL 7 & 8, 2021

The Family Office Association's Annual Single Family Office Symposium is a highly anticipated, private event for the global family office community to benefit from leading industry research and networking with like-minded peers. For this event, we have curated a world-class lineup of policy experts and investment practitioners to share valuable insights on the latest research and ideas in the fields of investing and family office management.

# Welcome to TFOA's 6th Annual Single Family Office Symposium



Thank you for joining us. We're fortunate to have another great line up of speakers and panel participants providing unique insights into today's public and private markets and the global economy. With family office principals and professionals from some of the wealthiest families in the world in attendance, TFOA remains the pre-eminent forum for single family offices to meet, network, and develop relationships.

This is all only possible with the trust of our members and the support of a few high quality sponsors. TFOA members adhere to a strict code of conduct with respect to privacy and confidentiality. While sponsors have been generous with funding, they will never receive contact information or an attendee list. Their support allows TFOA to host world class events and highly-curated networking opportunities for our community of single family offices, so we hope you'll join to thank them. And, I'm delighted to share that funding for this year's event will allow TFOA to donate a meaningful contribution to The University of Texas at Dallas to support student scholarships.

We hope this year's Symposium provides an informative, fun, and productive program; and the foundation for your further participation in TFOA's single family office community. Together we can all benefit from leading industry research and networking with like-minded peers and promote our single family office community as an important center for capital formation and investment. Thank you!

**Marc J. Sharpe**  
Chairman, TFOA

We at The University of Texas at Dallas are honored to co-host the 2021 Single Family Office Symposium. During the symposium, you will hear from some of the stellar faculty and staff that our students get to experience on a regular basis. UT Dallas is a top-tier research university, one of the fastest growing public universities in the nation. Our momentum owes much to being located in the dynamic Metroplex of North Texas. In our role as an economic engine for the region, we actively engage with industry and other top institutions such as The University of Texas Southwestern Medical Center.



We appreciate the opportunity to partner with TFOA in providing a program that includes representatives from the Jindal School of Management, the Jonsson School of Engineering and Computer Science and the Institute for Innovation and Entrepreneurship. Please consider a visit to UT Dallas in person in the near future. We would be delighted to show you around.

**Richard C. Benson**  
President  
Eugene McDermott Distinguished University Chair of Leadership  
The University of Texas at Dallas

# 6th TFOA Single Family Office Symposium

## OPEN TRACK, VIRTUAL FORMAT

### April 7th, 2021

9:00 am – 9:15 am CST

#### **Welcoming Remarks**

Marc J. Sharpe, Chairman, TFOA

9:15 am – 10:05 am

#### **Keynote Speaker**

- *Mitch Kapur, Co-Chair, Kapur Center for Social Impact*
- *Moderator: Jackie Kimzey, Professor, Naveen Jindal School of Management*

10:05 am – 10:10 am

#### **Short Intermission**

10:10 am – 11:00 am

#### **Biotech Investing Panel**

- *Racquel Bracken, Partner, Venrock*
- *Andre Perold, CIO, HighVista Strategies*
- *Anat Naschitz, Managing Director, OrbiMed Advisors*
- *Moderator: Shalini Prasad, Department Head, Bioengineering*

4:00 pm – 4:30 pm

#### **TFOA Member Only Daily Debrief Session**

4:30 pm – 6:00 pm

#### **TFOA Member & Sponsor Networking**

### April 8th, 2021

9:00 am – 9:15 am CST

#### **Welcoming Remarks**

Dr. Richard Benson, President of The University of Texas at Dallas

9:15 am – 10:05 am

#### **Future of Energy Panel**

- *Hossam Elbadawy, Managing Director, SCF Ventures*
- *Greg Bird, CEO & President, Jetta Operating Company*
- *David Bailin, Chief Investment Officer, Citi Private Bank*
- *Moderator: Mario Rotea, Professor, Mechanical Engineering*

10:05 am – 10:10 am

#### **Short Intermission**

10:10 am – 11:00 am

#### **Keynote Speaker**

- *Randi Zuckerberg, CEO, Zuckerberg Media*
- *Arielle Zuckerberg, Partner, Coatue Ventures*
- *Moderator: Nancy Fechnay, Partner, Flight Ventures*

4:00 pm – 4:30 pm

#### **TFOA Member Only Daily Debrief Session**

4:30 pm – 6:00 pm

#### **TFOA Member, Sponsor, & Attendee Networking**

# Day One

## Welcoming Remarks

### Marc J. Sharpe



Marc J. Sharpe is the founder and chairman of TFOA, an organization formed in 2007 to provide a forum for education and networking and to serve as a resource for single family office principals and professionals to share ideas and best practices, pool buying power, leverage talent and conduct due diligence. Mr. Sharpe's career in the investment and asset management industry spans more than 25 years. He has held positions in investment banking for Wasserstein Perella & Co. Inc and Goldman Sachs Group Inc., in addition to founding a venture capital incubator in the UK and working for Dell Inc. He subsequently took a position as portfolio manager and research director for Galapagos Partners LP, a full-service multi-family office serving a select group of ultra-high net worth families. After successfully growing the firm and surviving the 2008 market crash with a positive net return, Mr. Sharpe joined SigmaBleyzer Investment Group, an international private equity firm specializing in control investments with assets valued at \$1 billion. He was also a managing director for a boutique investment advisory firm providing alternative asset strategies to ultra-high net worth families and registered investment advisors.

Marc is currently an Operating Partner with Satori Capital, LLC, a Dallas and Fort Worth-based investment firm founded upon the principles of Conscious Capitalism. Immediately prior to Satori, Marc served as Partner & Managing Director at LCR Capital Partners, responsible for building strategic partnerships and investment opportunities throughout the world. Marc holds an M.A. from Cambridge University, a M.Sc. from Oxford University and an MBA from Harvard Business School. Mr. Sharpe is active in the community and has served on the Board of the Holocaust Museum Houston, the HBS Houston Angels, and on the Investment Committee for two Texas based foundations.

# Keynote Speaker

## Mitch Kapor



Mitch Kapor is a pioneer of the personal computing industry, and an entrepreneur, investor and advocate for social change. As founding Partner at Kapor Capital, Mitch invests in tech startups which close gaps of access, opportunity, and outcome for low-income communities and communities of color and in founders committed to building diverse workforces and inclusive cultures.

In 1982, Mitch founded Lotus Development Corporation and designed the Lotus 1-2-3 spreadsheet, the “killer application” which made the personal computer ubiquitous in the business world. He co-founded the Electronic Frontier Foundation in 1990 and is the founding chair of the Mozilla Foundation, creator of the Firefox web browser. Mitch is the co-Chair of the non-profit Kapor Center in Oakland, California, and also serves on the board of SMASH, the Summer

Math and Science Honors Academy, a three-year STEM-intensive residential college prep program that empowers students to deepen their talents and pursue STEM careers. His favorite saying is: “Genius is evenly distributed by zip code, but opportunity is not”.

## Jackie Kimzey



Jackie Kimzey is a successful CEO, board advisor, strategist, and professor. An experienced leader with knowledge and understanding in a variety of markets, Kimzey believes the foundation of any company’s success is grounded in market and customer-facing activities. He acts entrepreneurially in most situations and values execution skills and a culture of trust and accountability in companies he has been a part of. Mr. Kimzey’s career began at Mostek, a Dallas based semiconductor manufacturer, where he served in planning and marketing roles. He left Mostek in 1982 to start ProNet with the financial backing of L.J. Sevin. ProNet, a wireless and systems company, grew rapidly in the 80’s, completing an IPO in 1987 and the eventual sale of the company in 1997. After the sale in 1997, Mr. Kimzey worked on several start-up projects of interest and then joined the venture firm of Sevin Rosen Funds as a General

Partner in 1999. There he focused on wireless and software investments, especially software ideas focused on software as a service. His most successful projects have all had a common thread, good management and quality advisors and investors.

Since 2007 Mr. Kimzey has served on the faculties of Southern Methodist University and The University of Texas at Dallas where he shares his lessons about innovation and new ventures with enthusiastic young entrepreneurs. He served as the Executive Director for the Institute for Innovation and Entrepreneurship at UT Dallas and is a frequent speaker and lecturer on the topics of innovation, investment, and management. Over his career, he has served on several private and public boards and continues his work advising and mentoring young entrepreneurs.

# Biotech Investing Panel

## Anat Naschitz



Anat Naschitz co-founded and co-leads OrbiMed Israel, raising 2 funds with \$529m under management. OrbiMed is a preeminent global healthcare investment firm with ~\$18 billion under management across public and private asset classes. Anat serves on the boards of biotech, digital health and medical device companies, some of which she either founded or nurtured from an early stage. Current examples include 89bio (Nasdaq:ETNB), a biotech company Anat co-founded as a pharma spinout and helped take public 18 months later; Tyto, a telemedicine device platform in which she invested early and saw through notable success; ForSight Vision 6, developing an Accommodating IntraOcular Lens under a Strategic agreement; Azura, in the clinic with novel therapeutics for prevalent ophthalmology indications; and MDClone, commercializing novel analytics and synthetic technology which enables

immediate querying and sharing of healthcare data.

In her 25 years in the healthcare space, Anat has worked with companies of all sizes, including major pharmaceutical companies on one hand and nascent biotechs on the other. Previously Anat created, invested in and advised companies across the entire healthcare spectrum in terms of stage and subject matter. She was an Associate Partner with McKinsey in London, where she managed strategy and M&A projects for senior management of the world's preeminent pharmaceutical and biotechnology companies. Anat led pharmaceutical spinout work resulting in the creation of European biotech companies valued at billions of dollars. Post McKinsey Anat joined Apax Partners, where she focused on life sciences investments. She earned her MBA at INSEAD and her LL.B. at Tel Aviv University.

## Shalini Prasad



Shalini Prasad is the Cecil H. and Ida Green Professor and Department Head of Bioengineering and Biomedical Engineering graduate program at The University of Texas at Dallas. Dr. Prasad's research interests are multi-disciplinary. Her current research interests focus on addressing public health challenges of rapid and cost-effective diagnostics that towards the diagnosis of various diseases such as cancer, neurodegenerative diseases, and cardiovascular diseases. Dr. Prasad's research laboratory has been actively participating in developing translational technologies for affordable molecular diagnostics platforms. Her research work has been supported by a number of federal and state agencies as well as foundations and corporate entities.

She has uniquely positioned her research to facilitate public-private partnerships towards economic growth. She has 120 peer reviewed journal publications, 15 peer reviewed book chapter, 172 peer reviewed conference papers/abstracts, 163 presentations at scientific conferences, 4 published patents and 9 patent applications. Her work has also been reported and covered in popular press. She is the recipient of a number of awards in the area of nano-biotechnology. In her academic role at UT Dallas she has supported has supervised over 70 graduate researchers, 119 undergraduate researchers and 27 high/middle school students.

# Day Two

## Welcoming Remarks

### Dr. Richard C. Benson



Dr. Richard C. Benson is the fifth president of The University of Texas at Dallas, a young university of very high research activity (Carnegie R1) that is growing rapidly in size and stature. Between 2007 and 2017, according to the Chronicle of Higher Education, UT Dallas was the nation's second-fastest growing public university. Benson earned a bachelor of science and engineering degree in aerospace and mechanical science from Princeton University in 1973, a master's degree in mechanical engineering from the University of Virginia in 1974, and a doctorate in mechanical engineering from the University of California, Berkeley in 1977.

Prior to beginning his university career, he worked for the Xerox Corporation as a technical specialist and project manager from 1977 to 1980. He joined the University of Rochester in 1980 as an assistant professor of mechanical engineering and was named the top teacher in the College of Engineering and Applied Science in 1981. He progressed to associate professor in 1983 and full professor in 1989. He served as associate dean for graduate studies in the College of Engineering and Applied Science from 1989 to 1992 and as chair of the Department of Mechanical Engineering from 1992 to 1995. Benson's research at the University of Rochester was primarily focused on the mechanics of highly flexible structures. With sponsorship from the Eastman Kodak Company, Hewlett-Packard, Bausch & Lomb, Xerox and others, he and his advisees modeled magnetic disks and tapes, paper sheets, soft contact lenses, photographic film and other easily deformed structures.

At Penn State University, Benson served as head of the Department of Mechanical Engineering from 1995 to 1998 and head of the Department of Mechanical and Nuclear Engineering from 1998 to 2005. He co-taught, with a partner from the Women in Engineering Program, first-year seminars on toy making and dancing robots.

As dean of Virginia Tech's College of Engineering, Benson oversaw record growth from 2005 to 2016. The number of engineering applicants nearly doubled during his tenure. Also, the College of Engineering climbed to a top-10 ranking in the National Science Foundation's report on engineering schools' research expenditures. Benson's teaching interests are in the fields of structural mechanics, design and applied mathematics. At the graduate level he has taught courses in structural mechanics, structural stability, plates and shells, elasticity and continuum mechanics. At the undergraduate level he has taught courses in advanced mechanical design, statics, mechanical systems, kinematics, complex variables and boundary value problems.

Benson has received three significant honors from the American Society of Mechanical Engineers (ASME). In 1984 he received the ASME Henry Hess Award, which honors a research publication by a young author. In 1998 he was made a Fellow of the ASME. In 2009 he was elected to a three-year term on the ASME Board of Governors (2010-13). He also has held editorial positions with the ASME Journal of Applied Mechanics, ASME Press and Applied Mechanics Reviews.

# Biotech Investing Panel

## Racquel Bracken



Racquel Bracken joined Venrock in 2016 and focuses on pharmaceutical and biotech investments, as well as company creation. She currently serves on the Board of Cyteir Therapeutics, Prothelia and Federation Bio, a company she co-founded and initially served as CEO. She is also a Board Observer at Inscripta. Prior to Venrock, Racquel was an early employee of Clovis Oncology, a biopharmaceutical company focused on acquiring, developing and commercializing targeted small molecule therapies in combination with companion diagnostics. She held a variety of business development and commercial roles and was responsible for the acquisition of four pipeline products, and led the commercial launch efforts for the PARP inhibitor program in ovarian cancer.

Earlier in her career, Racquel was on the investment team at Domain Associates where she focused on early-stage healthcare investing. During her tenure there, Racquel also led business development at Calixa Therapeutics (acquired by Cubist Pharmaceutical). Prior to joining Domain Associates, she was a consultant with Easton Associates (now Navigant Consulting), a management consultancy dedicated to the medical industry.

Racquel is an avid backcountry skier, mountaineer, and mountain biker as well as a supporter of high school debate programs. She holds a bachelor's degree in molecular and cellular biology from Harvard University and is also a member of the Kauffman Fellows.

## Andre Perold



André is a Co-Founder, Managing Partner, and Chief Investment Officer of HighVista Strategies. He was previously the George Gund Professor of Finance and Banking at the Harvard Business School where he served in senior roles including Senior Associate Dean and Chair of the Finance Faculty. André's research and teaching were in investment management and the capital markets, for which he won numerous awards.

André is a Board Member of The Vanguard Group and RIT Capital Partners and he serves on the Investment Committee of Mass General Brigham. He received a BSc (Hons) from the University of Witwatersrand, Johannesburg, and an MS and PhD from Stanford University.

# Future of Energy Panel

## Hossam Elbadawy



Hossam Elbadawy is the Managing Director of SCF Ventures and Technology Partner at SCF Partners. Before joining SCF, Hossam founded O&G Technologies, a Houston-based technology incubator focused on the oil and gas industry. He has over 28 years' experience in the energy sector, technology development, and commercialization. Hossam has served as Senior Operating Partner at Lime Rock Partners and as CEO of Tercel Oilfield Products.

Before these roles, Hossam spent nearly 17 years at Schlumberger, where he served as Vice President of Manufacturing and managed the Rosharon Technology Center and the Houston Product Center. Hossam received an MBA (Kellogg) and a Masters in Engineering Management from Northwestern University and a Bachelor's degree in Mechanical Engineering from Ain Shams University.

## Greg Bird



Greg Bird is CEO and owner of Jetta Operating Company, Inc. With over 35 years' experience in the oil and gas industry, he formerly worked for Hunt Energy Corporation and was a partner with Cawley Gillespie & Associates, a petroleum consulting firm. He has expertise in reservoir engineering, reservoir management and economic analysis and has served as a professional witness in federal and state courts. His professional associations include the Society of Petroleum Engineers and the Fort Worth Wildcatters. Greg is supportive of the community, previously serving as board president for both the Boy Scouts of America's Longhorn Council (2010-2012) and the Fort Worth Petroleum Club. He currently serves as board president for the Botanical Research Institute of Texas (BRIT) and the Boy Scouts of America's Longhorn Council Foundation. Greg is also engaged in education, serving as a board member for both Texas A&M University's Petroleum Engineering Industry Board and the TCU Neeley

Energy MBA Advisory Board.

Greg was recently named a Finalist in the 2020 Southwest Region for the EY Entrepreneur of the Year award. He is also the recipient of numerous BSA awards: the 2018 Distinguished Citizen Award, the Engineering "Good Scout" Award (2002), the Silver Beaver Award and the National Eagle Scout Association's Outstanding Eagle Scout Award. In 2013, he was inducted into the Academy of Distinguished Graduates for the Petroleum Engineering department at Texas A&M University. Greg holds a Bachelor of Science in petroleum engineering from Texas A&M University and is a registered Professional Engineer in the state of Texas.

# Future of Energy Panel

## David Bailin



David Bailin is Managing Director, Chief Investment Officer for Citi Private Bank. In this capacity, David acts as a single focal point for Investment Management, Investment Research and Client Investment Practice. He ensures the best integration of our asset allocation, research and portfolio management teams and offers his perspectives on the markets. David joined Citi in 2009 as the Global Head of Managed Investments and was promoted to Global Head of Investments in October of 2017. Since joining the Private Bank, he has attracted

and retained a highly talented, diverse senior executive and investment management team. David designed the architecture of the global managed investments platform, including its Citi Investment Management unit, a leading global investment management organization, and the bank's distinctive private

equity, real estate, hedge fund and traditional investment teams. Additionally, David was responsible for operational due diligence, portfolio asset management, asset allocation modelling, and product innovation.

Citi Private Bank is known for its independent and objective advice and as a leader in global investment management. It has been recognized in the industry by: Financial Times' The Banker and PWM Global Private Banking Awards 2018: Best Global Private Bank, Best Global Private Bank for Customer Service; Family Wealth Report Awards 2018: Best North American Private Bank, Best Alternative Asset Manager, Best Art & Private Collections, among others. David regularly provides commentary on TV and in print on global investing, asset allocation, family office investment management and the investing trends of high net worth clients globally. He has been interviewed by CNBC, Bloomberg TV and Fox Business News and has been quoted in Barron's, The Wall Street Journal, Financial Times and New York Times, among others. Prior to joining Citi, David was Managing Director and Head of Alternative Investment Asset Management for Bank of America Global Wealth and Investment Management, where he was responsible for client alternative investments across private equity, real estate, venture capital and hedge funds.

David holds a BA with honors from Amherst College and an MBA with honors from Harvard Business School. He is married with three daughters and lives in Connecticut.

## Mario Rotea



Mario A. Rotea is the holder of the Erik Jonsson Chair in Engineering and Computer Science at The University of Texas at Dallas. He is cofounder of WindSTAR, an NSF Industry University Cooperative Research Center aimed at bringing together academia and industry to advance wind energy through industry-relevant research and education. He is also the director of UTD Wind, a center recently created at UT Dallas for the advancement of wind energy science and engineering.

# Keynote

## Randi Zuckerberg



Randi Zuckerberg is an entrepreneur, investor, bestselling author, and Emmy-nominated tech media personality. She is the founder and CEO of Zuckerberg Media, with the mission of supporting current and future entrepreneurs through investment, mentorship, and media. Prior to founding her own company, Randi was an early employee at Facebook, where she is best known for creating Facebook Live, now used by more than a billion people around the world. A Harvard graduate, Randi hosts a weekly business talk radio show, Dot Complicated on SiriusXM and is the author of four books: two best-selling business books, Dot Complicated and Pick Three, and two children's books, Dot (currently also an award-winning preschool television series on Universal Kids and Hulu) and Missy President.

Randi travels the world, speaking about technology, entrepreneurship, her time in Silicon Valley, and shockingly...how to unplug! When she's not Facebooking or actual written-word booking, she can be found at the theater - as a two-time Tony Award winning Broadway producer of Hadestown and Oklahoma! - or doing her best to unplug at home with her husband and three children.

## Arielle Zuckerberg



Arielle Zuckerberg joined Coatue in May 2018 to help spearhead an early stage fund alongside Matt Mazzeo, Yanda Erlich and Matt Mulvey -- a major departure for the growth-stage investor and hedge fund. Zuckerberg had already built a reputation in the venture world: as a partner at Kleiner Perkins Caufield & Byers, she invested in The Wing, Willo, Voodoo Manufacturing and Handshake. A part-time DJ who graduated from Claremont McKenna College, she worked at two acquired startups, Wildfire Interactive and Humin, and is a personal investor in companies including Flipkart and Houzz.

## Nancy Fechnay



Nancy Fechnay has been a part of the investment and startup world for nearly 15 years. She co-founded 3 tech companies resulting in one exit and one seed stage, 'future of work' company (backed by Atomico and Outlier in Europe). Nancy started her career in cleantech venture capital but has since covered a large spectrum of tech sectors. She worked for Kleiner Perkins Caufield & Byers and GE Ventures before becoming a partner at Flight Ventures in 2015. Nancy has invested alongside top tier US and EU based firms, such as Greycroft, Mucker Capital, Google Ventures, A16Z, Bessemer, Balderton and Octopus Ventures.

Nancy is currently a partner in two syndicates and a co-lead of the Towerview Fund (part of AVG). AVG has a unique model with 22 funds, which together deploy around \$300M in capital per year. Nancy is passionate about supporting minority founders and investing in companies addressing the world's most pressing problems.

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