

Jeff Marshall, CFA
Director
Convergent Wealth Advisors

Convergent Wealth Advisors is a large wealth advisor with approximately \$10 Billion in investments including Hedge Funds, Private Equity, Real Estate and traditional assets.

Jeff Marshall is Director of Convergent's Alternative Investment Strategies and is a member of the Investment Committee, which focuses on developing the firm's investment strategy, investment recommendations and portfolio implementation strategies. He serves as the lead investment consultant for the firm's alternative research-based clients and is the portfolio manager for multiple proprietary hedge fund of funds. In addition, Jeff oversees the overall activities of Convergent's Research Group, including ongoing manager sourcing, due diligence, portfolio construction, and risk management across multiple hedge fund strategies.

Prior to joining the Convergent, Jeff was the Director of Research for Windermere Investment Associates. Previous to this, he was a Senior Analyst in the Family Wealth Group at Sanford C. Bernstein, based in San Francisco, where he analyzed client portfolios, advised on single stock diversification and oversaw the asset allocation efforts for the firm's high-net worth clients.

Jeff earned a Bachelor of Science degree in Finance from Bentley College, is a Chartered Financial Analyst, and holds the NASD Series 7 and 63 licenses. He also sits on the advisory board of the Portland Alternative Investment Association.

Bob Scanlan
Chairman and CEO
ScanlanKemperBard Companies

Mr. Scanlan has more than 33 years of regional and national commercial real estate experience. Prior to founding SKB, he worked for CB Commercial, Inc. (CB Richard Ellis) for 18 years, where he held various senior management positions in Portland, Seattle, Denver, New York and Los Angeles, concluding as President of Capital Markets and a Director with responsibility for investment banking, mortgage banking, appraisal and consultation. Before joining CB Commercial, Inc., Mr. Scanlan served as Vice President & National Operations Manager for W.W. Grainger, Inc. in Chicago. He also headed PacifiCorp Financial Services Real Estate Investment Banking Group from 1991-1993 and currently sits on the Board of Directors of Opus Northwest, LLC, architects, contractors and developers in Minneapolis, Minnesota.

A firm believer in community involvement, Mr. Scanlan has served as trustee of Reed College, Portland Art Museum, Oregon Museum of Science & Industry, Portland State University, Regional Arts & Culture Council, Los Angeles Theatre Center, Denver Center for the Performing Arts and Self Enhancement, Inc. He currently sits on the board of trustees as past President and Lifetime Trustee of Providence St. Vincent Medical Foundation (voted one of the top 100 hospitals in the U.S. the last seven years), and President of Portland French School Board of Trustees. Mr. Scanlan earned his Bachelor of Arts degree from Beloit College, majoring in History.

Larry Mendelsohn

Partner / Founder
Flanders Street Capital Management LLC
Partner
Aspen Capital LLC

Larry brings a wealth of experience from years on Wall Street. He concurrently serves as the principal and managing member of Flanders Street Capital Management LLC, an asset and credit driven high yield corporate debt partnership, Alleycat I, II, and III LLC, which invest in distressed corporate debt and equity, and is a partner in Aspen Capital LLC which manages a series of hard money and special situations real estate funds.

Larry has served as President and Director of Wilshire Financial Services Group and Fog Cutter Capital Group, Head of Emerging Market Capital Markets at Bankers Trust New York and Head of Equity and Distressed Securities Proprietary Trading at J.P. Morgan Securities. He holds degrees in Economics (A.B., University of Chicago), International Politics (M.A., University of Texas) and Finance (Ph.D./ ABD, University of Southern California).

Brian Oliver

Senior Managing Director
Aequitas Capital Management

Mr. Oliver joined Aequitas Capital Management ("Aequitas") in 1997 and became a principal in 1999. Mr. Oliver currently oversees the Corporate Debt activities of Aequitas, which includes both secured and subordinated debt/minority equity transactions to middle market companies, alternative energy projects, and the health care sector. Since joining Aequitas, Mr. Oliver has participated in over \$1 Billion of debt, equity, and M&A transactions.

Prior to joining Aequitas, Mr. Oliver spent over 15 years in corporate banking, with particular expertise in financing middle-market companies in a wide variety of industries. His experience includes a wide range of advisory and capital raising activities, including consulting and refinancing for distressed or high-growth companies, mergers and acquisitions, structuring acquisition financing for leveraged buyouts, real estate transactions, and structuring traditional working capital and equipment loans.

Mr. Oliver has a B.S. in Business from Oregon State University with an emphasis in Finance and a minor in Economics. He serves on the boards of both the Austin Entrepreneurship Program at Oregon State University, and Adelante Community Development Corporation, a non-profit organization focused on affordable housing development for the Latino and other low income communities.