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# **The Appetite for Alternatives: Capital Raising Across the Alternative Complex**

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**Jerome Casamatta, CFA**  
**Vice President and Portfolio Manager**  
**Lyxor Asset Management**

Jerome Casamatta provides investment advisory services on alternative investments to institutional clients. Prior to joining Lyxor, Mr. Casamatta worked as a risk manager at Credit Suisse Securities in New York, where he was responsible for assessing and approving new products from a market risk point of view. He also worked for Reuters America in the Fixed Income Trading then Risk groups, providing clients, prospects and internal contacts with product and market advice. Mr. Casamatta received his MBA from an exchange program Northeastern/Salem USA and Montpelier Graduate School of Business, France, and is currently completing a Masters of Mathematical Finance at Columbia University in New York. He also holds the Chartered Financial Analyst certification and is a member of the New York Society of Securities Analysts.

**Tom Hodge**  
**COO & General Partner**  
**Frazier Healthcare Ventures**

Mr. Hodge joined Frazier Healthcare Ventures in 2000 as a Partner and COO and became a General Partner in 2005. Mr. Hodge has over 25 years of experience working with emerging healthcare and information technology companies and management of professional organizations. At Frazier Healthcare, Mr. Hodge oversees the firm's operations, assists with the evaluation and structuring of portfolio investments, supports portfolio planning and exits and coordinates firm strategic planning and development of personnel.

Prior to joining Frazier Healthcare, Mr. Hodge was general counsel and a member of the executive management team at Loudeye Technologies, a publicly traded high tech company that provided products and services to incorporate digital media into Web communications. Before joining Loudeye, Mr. Hodge practiced corporate and securities law for 20 years, most recently as a partner in the emerging companies practice group and chairman of the Seattle business department of Heller Ehrman/Venture Law Group, an international law firm. In his law practice, Mr. Hodge managed venture capital financings, public offerings and M&A transactions and advised clients on corporate governance and securities compliance matters. Mr. Hodge graduated from the University of Virginia School of Law and Houghton College.

**Jeff Marshall, CFA**  
**Director**  
**Convergent Wealth Advisors**

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 a 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 Financial Industry Regulatory Authority (FINRA) Series 7 and 63 licenses. He also sits on the advisory board of the Portland Hedge Fund Society.

**Jeff M. McCarthy**  
**Senior Vice President**  
**Jefferies & Company, Inc.**

Jeff currently manages the Capital Introduction business on the West Coast for the Prime Brokerage Group at Jefferies & Company, Inc.

Previously, Jeff spent the past ten years of his professional career building, running, and marketing boutique investment management firms. Most recently, Jeff has advised several emerging hedge funds and served as Chief Operating Officer, Chief Compliance Officer, and Director of Marketing for two hedge funds in Southern California. Jeff has structured numerous joint ventures, raised seed and early stage capital, and launched an offshore investment vehicle to reach non U.S. investors. His efforts have produced tens of millions of dollars in new assets for the firm that engaged him. Jeff has been a guest panelist numerous times on topics such as capital raising for hedge funds as well as operational and regulatory issues facing the hedge fund community.

Jeff started his career with the Business Consulting Practice at Arthur Andersen in Chicago, IL. His focus was on business process re-design and his clients were

Global 1000 firms such as: DuPont and Credit Suisse Private Banking in Zurich, Switzerland, among others.

Jeff has a BS in Finance from Miami University in Oxford, Ohio.

**Mitch McCullough**  
**President**  
**Standard Pacific Capital, LLC**

Mitch McCullough is President of Standard Pacific Capital and oversees all non-investment aspects of the business, focusing primarily on marketing and investor relations. Prior to joining Standard Pacific in 2009, Mr. McCullough was the Global Head of Sales at Visa Inc. He spent the majority of his career as Managing Director at Citigroup where he oversaw sales and sales trading of all U.S. equity products globally. Mr. McCullough received his BS from Ursinus College.

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