

PAM editorial advisory board welcomes new members

PAM magazine has added to its editorial advisory board to better efficiently produce relevant and thoughtful content to our readership: Julianna Rosenbluth Obeid of Frank Crystal, Andrew Douglass of Tiedemann Wealth Management and P. Scott Gregorchuk, CEO of Forbes Family Trust and LGL Partners.

Obeid is a director in Frank Crystal & Company's National Business Unit. She is responsible for client development across all units of the company, working with corporations and individuals to provide outsourced risk management services across the breadth of their assets. Additionally, she negotiates with the insurance marketplace on behalf of clients to deliver the best terms and conditions in line with goals. This integrated effort benefits families of substantial wealth seeking comprehensive solution sets for their family businesses and personal assets.

Douglass is a senior vice-president at Tiedemann and is primarily responsible for business development and client management. He also oversees the firm's relationships with other client advisors including attorneys and accountants, and has over 20 years of experience in investment management business development and financial services executive recruiting. Prior to joining Tiedemann, Douglass worked for Fairfield Antara, a division of the Fairfield Greenwich Group.

Gregorchuk is the CEO of Forbes Family Trust and LGL Partners. Before joining FFT and LGL, he was a managing director at the J.P. Morgan Private Bank where he delivered wealth management advice to J.P. Morgan's wealthiest families, foundations and corporations. He headed Global Client Solutions for the Global Wealth Management division at Citigroup and was a member of the Citigroup Management Committee.

EXISTING ADVISORY BOARD MEMBERS INCLUDE:

- Daniel Carlin, WorldClinic Inc.: Founder of WorldClinic Inc., a medical and telemedical practice caring for high-net-worth families and international executives.
- Michael Cole, US Bank Corp: President of the Ultra-High-Net-Worth Group at US Bank and responsible for setting the strategic direction and overseeing all aspects of the business.
- Maryann Fernandez, Philanthropy Indaba: Founder & president of Philanthropy Indaba, a unique consultancy that develops customized philanthropic journeys and opportunities for learning and service locally, nationally or internationally.
- David Guin, Withers Bergman: Partner at Withers Bergman. He focuses on advising high-net-worth domestic and international individuals, families and family offices and their advisors about their obligations under US securities laws.
- Natasha Pearl, Aston Pearl: In 2002, Natasha Pearl founded Aston Pearl, "the family office for everything except money",



Andrew Douglass



P. Scott Gregorchuk

Julianna
Rosenbluth Obeid

providing objective advisory to single-family offices on private staffing, residential operations, aviation, art, eldercare and other lifestyle areas.

- Stephen Prostano, Silver Bridge Advisors: Leads Silver Bridge as president. Prostano has more than 25 years of global financial service experience, building wealth and asset management businesses. Prior to Silver Bridge, Prostano was president of Atlantic Trust, the \$17bn private wealth management division of AMVESCAP PLC.
- Jeff Spears, Sanctuary Wealth Advisors: Co-founder and CEO of Sanctuary Wealth Services, LLC. Spears has more than 24 years of experience in wealth management as a wealth advisor and a national manager of the wealth management businesses at Montgomery Securities, Bank of America Private Bank and Presidio Financial Partners, LLC.
- Megan Sterrett, Ellis Lake Capital: Director of marketing and investor relations for Ellis Lake. Prior to that, she worked at Doshi Capital Partners & Heritage Capital India, being involved in manager selection (internal fund of funds), direct investments and oversight of over two financial businesses.
- Allison Taff, Silver Bridge Advisors: As director of Family Office Partners, Taff is responsible for growing the Silver Bridge family office practice. In her role, Taff collaborates with her colleagues on the investment, accounting, operations, technology, and client advisory teams.
- Jamie McLaughlin, J.H. McLaughlin & Co.: McLaughlin has more than 20 years of experience in both senior operating roles and client-facing roles in the family office and ultra-high-net-worth industry. He recently founded a strategy consulting practice for various wealth management organizations and family offices. He was most recently CEO of Geller Family Office Services, a New York MFO.
- Linda Mack, Mack International: Founder and president of Mack International, a boutique firm that specializes in providing retained executive search and strategic consulting services to single and multi-client family offices and wealth management industry clients.

For inquiries regarding how to join the Wealth Advisory Board, please contact managing editor Kristen Oliveri at k.oliveri@pageantmedia.com. ■