

FAST FORWARD



**THIRD ANNUAL FAMILY
BUSINESS SUMMIT**

Agenda

**Fast Forward 2026:
Third Annual Family Business Summit**

Thursday, May 7, 2026 ~ Tavistock Country Club

11:30 am REGISTRATION & NETWORKING

11:45 am LUNCH

12:00 pm **Lunch & Learn** **What Is Working in Venture Capital Today**
Hugh O'Donnell, General Partner and Managing Director, True Equity -
Over 100 investments in seed and early-stage companies

12:30 pm **Giving & Philanthropy** **Hear From The Holman, Brown, Green & Sparrow Families**
Philanthropic giving and community impact - Alicia McGowan, Brittany
Green Daniels, Britny Francis, and Michelle Sparrow

1:15 pm BREAK

1:30 pm **Boards of Directors** **Type, Authority, Function & Structure**
Deborah Hays, Partner and Chair of Archer's Corporate Group since 2013 -
In conversation with Caleb White, Carl Ortell and Jim Carll

2:15 pm **Family Offices** **The Family Office Demystified**
Michael Ouellette, President, Starboard Advisors, has served as a family
office executive for 25 years representing family assets of over \$4 billion

3:00 PM **Keynote** **Stephen Pina**
Partner, Archer's Sports and Entertainment Group
Hazel Clark
Three-Time Olympian, 6-Time USA Champion, Author and TEDx Speaker
Ashley Howard
Villanova University, Men's Basketball, Assistant Coach

3:45 pm CLOSING REMARKS

4:00 pm COCKTAILS

Speakers



Travis Coley
Director of Growth & Strategy
Whitepenny

Travis Coley is the Director of Growth & Strategy at Whitepenny. Leaning on two decades of strategic planning and corporate finance experience, Travis helps advise clients through the lens of gaining strategic advantage, growth, capital investment, and brand as an asset. He partners with clients to define brand strategy and establish a differentiated market position.



Deborah Hays
Chair, Board of Directors
Archer & Greiner, P.C.

Deborah Hays is Chair of Archer & Greiner's Board of Directors and Chair of the firm's Corporate Group. She has more than 30 years of experience advising companies ranging from startups to large international corporations, as well as financial institutions. Her practice focuses on complex business transactions, including business financing, securities offerings and compliance, mergers and acquisitions, and technology transfer and licensing. Debbie has extensive experience handling high-value debt and equity transactions, often exceeding \$100 million, including public offerings, private placements, venture capital, and institutional lending. Debbie regularly counsels clients on corporate governance, risk management, and organizational matters, and represents buyers, sellers, and executives in sophisticated M&A transactions across a range of industries. Debbie is the Immediate Past Chair of the Board of Directors of the Chamber of Commerce of Southern New Jersey.

Speakers



Ashley Howard
Assistant Coach
Men's Basketball
Villanova University

Ashley Howard, who played a pivotal role in helping guide Villanova teams that won a pair of NCAA national championships in 2016 and 2018, rejoined the Wildcats as an Assistant Coach in May 2023. He completed his first season working for Head Coach Kevin Willard in 2025-26, helping to guide the Wildcats to a 24-9 overall record and the program's first NCAA Tournament appearance since 2021-22.

A native of Philadelphia, Howard spent five seasons from 2013-18 working for Naismith Memorial Basketball Hall of Fame Head Coach Jay Wright. In that span, Villanova earned four BIG EAST regular season titles, three BIG EAST Tournament crowns and posted an overall record of 165-21 (.887). Among the Wildcats Howard helped tutor were Ryan Arcidiacono, Josh Hart, Mikal Bridges and Jalen Brunson. Following the 2017-18 season, Howard was named the Head Coach at La Salle University where he served four seasons.

Prior to Villanova, Howard accrued a decade's worth of college coaching experience at three different stops. He began his coaching career as a student assistant coach at his alma mater, Drexel University, in 2002 after injury cut short his playing career for the Dragons. In 2004, following graduation, Howard was hired as an assistant coach at La Salle by Dr. John Giannini. In 2012-13, Howard served as an assistant at Xavier University before landing back in the Delaware Valley at Villanova. Howard graduated from Drexel in 2004 with a bachelor's degree in communications.

Speakers



Stephen Pina
Partner
Archer & Greiner

Stephen Pina has more than two decades of experience representing artists, creators, and companies across film, television, music, digital media, and live entertainment. He advises clients on a wide range of transactional matters, including development and production deals, talent agreements, option and purchase arrangements, recording and publishing contracts, licensing, intellectual property strategy, and brand partnerships. He has negotiated deals exceeding \$30 million and represents Grammy Award-winning and nominated producers, writers, and artists, as well as Emmy-nominated filmmakers and producers. Stephen also maintains a strong sports practice, having represented professional basketball players and negotiated seven-figure NIL agreements for athletes and college programs. A former Division I track and field athlete at Penn State University and the University of Florida, he is a Big Ten Champion, five-time All-American, and Academic All-American.



Barton W. Weisenfluh, CFP®
CEO & Founder
Starboard Advisors

Bart Weisenfluh is the Founder & CEO of Starboard Advisors. He has worked with families for over 28 years in the investment management and financial planning business. Bart began his career in the executive training program at Tucker Anthony, Inc. In 1998 he joined the New York based money management firm W.P. Stewart as Vice President and assisted with the opening of their Portland office. He co-founded Plimsoll Mark Capital in 2008 where he served as a fiduciary for families in North America. Mr. Weisenfluh holds a B.A. in Political Science with a minor in Japanese from Union College and an M.B.A. from the Whittemore School of Business at the University of New Hampshire. He also is a Certified Financial Planner™ professional. Mr. Weisenfluh has served on the board of directors for Big Brothers Big Sisters of Southern Maine, Portland Yacht Club, Add Verb Productions and the Falmouth Youth Lacrosse Association. In addition, he serves on private advisory boards for numerous families.

Speakers



Hazel Clark

Three-time US Olympian;
Founder, Hazel Clark
Running Camps;
USA Bobsled Board
Member;
District Director of
Development-Metro YMCA
of the Oranges

Hazel Clark is a three-time U.S. Olympian, University of Florida Hall of Famer, and an accomplished leader who bridges elite sport, business development, and nonprofit impact. As the Global Director of Business Development & Partnerships at the Bermuda Tourism Authority, Hazel designed and delivered strategic initiatives that repositioned Bermuda as a premier sports-tourism destination—creating scalable event platforms, securing high-value partnerships, and aligning public- and private-sector stakeholders to drive measurable economic and community outcomes. She now serves as YMCA District Director of Development, combining corporate strategy with nonprofit leadership informed by her experience as an executive director of a community organization.

An elite competitor, Hazel’s athletic résumé includes seven national championships, three NCAA indoor titles, three NCAA outdoor titles, and an undefeated SEC record. Appointed a U.S. Sports Envoy, she partnered with the U.S. Department of State and World Learning to deliver sports-and-education programs that empower youth worldwide. She serves on the boards of the Lyles Brothers Sports Foundation and USA Bobsled and mentors emerging leaders, advocating for inclusion, gender equity, and clear pathways to sport and professional opportunity.

An experienced public speaker, Hazel has presented at the PGA Show, Bermuda Celebrity Invitational, Athene Career Expo, SailGP Champions for a Cause forum, NCAA Student-Athlete Conference, Women of Excellence Banquet, and Business Journal Women’s Leadership Forum. Hazel is also the author of the children’s book *Hazel Takes the First Step*.

Based between Bermuda and New Jersey, Hazel is a devoted wife and mother who prioritizes wellness and family. Her career reflects a singular focus: leveraging sport and strategic partnerships to build community, unlock opportunity, and inspire the next generation to lead with resilience and purpose.

Speakers



Deborah Kessler
Chief Development
Officer

Deborah Kessler serves as Chief Development Officer for the Metropolitan YMCA of the Oranges, bringing more than a decade of distinguished leadership in higher education advancement at the University of Arizona and the University of Arizona Foundation.

During her tenure, Ms. Kessler played a key role in the University of Arizona's ambitious \$3 billion comprehensive campaign, securing transformational philanthropic support across capital projects, research, athletics, faculty and student success initiatives. Her leadership helped make possible landmark gifts, including the naming of ALKEME Arena and construction of the Andrew Weil Center for Integrative Medicine's flagship facility and the Iris Cantor Building.

As Assistant Vice President for Principal Giving and Regional Development, Ms. Kessler led the university's national fundraising strategy. She built and directed a team of regional gift officers forging lasting partnerships with alumni, donors, and foundations across the country to advance the university's philanthropic mission. Her work was instrumental in shaping the university's national development model, which continues to guide its philanthropic outreach today.

Prior to her career in higher education, Ms. Kessler worked in the private sector, specializing in marketing and business development. As Managing Director of a prominent Wall Street financial firm, she advised clients and managed projects across sectors including financial technology, health and wellness, beauty, food and beverage, real estate, and telecommunications.

Ms. Kessler is a proud alumna of the University of Arizona. As a student, she served as President of the Student Alumni Association and as a director on the university's national alumni board. She earned honors from Phi Kappa Phi, the National Society of Collegiate Scholars, and the University of Arizona Honors College, and was named a Medici Scholar.

Speakers



Erich Hickey
Chief of Staff & CIO
Green Family Office
Green Family Foundation

Erich Hickey is the Chief of Staff and the Chief Investment Officer for the Green Family Office and Green Family Foundation overseeing portfolios across public and private investments. Erich was previously Chief Operating Officer and Chief Investment Officer of Drexel Morgan Capital Advisers, a \$3B wealth advisor and Director of Investments at a single-family office near Philadelphia. In these roles he leads the strategic initiatives across business development, business operations, and marketing. In addition, he was responsible for macroeconomic research, financial market analysis, investment strategy and research, manager selection, asset allocation and portfolio management. He currently serves on the investment committee for the Pennsylvania Horticultural Society and LaSalle Academy.



James Carll
Of Counsel
Archer & Greiner

James Carll practices corporate law with a focus on corporate governance, complex business transactions, mergers and acquisitions, and financings. He has represented companies ranging from Fortune 100 corporations to small and middle-market companies and closely-held businesses. He advises companies and boards of directors on corporate governance matters, including fiduciary and regulatory obligations, executive compensation, corporate structure and succession planning, and shareholder relations and disputes. Jim has served as outside general counsel to several nonprofit organizations. He has significant M&A experience, representing buyers and sellers in sophisticated transactions. Jim has deep experience in financings, including public and private offerings, bank financings, foreign debt placements, venture capital, convertible debt, sale-leasebacks, and securitizations, with transactions ranging up to \$1 billion. Jim served as Chair of Archer's Board of Directors from 2002 to 2019 and Chair of the firm's Corporate Group from 1991 to 2013.

Speakers



Carl Ortell
Retired CEO
Holman Organization

Carl Ortell served as the CEO of Holman from 2015 – 2023 and was Vice Chair of the Holman Board in 2024 and 2025. Prior to becoming the CEO of Holman, Carl was the president of the organization’s fleet management division. During his time within that division, he served in multiple operational and financial positions with increasing responsibility, including chief financial officer and chief operating officer prior to becoming president. He was a leader within the industry as well and was long active in many of the industry’s leading professional associations, including NAFA and the American Automotive Leasing Association (AALA). He eventually came to serve as the President of AALA after having served as Vice President of State Government Affairs for the organization. He also served as president and chairman of Global Fleet Services, Inc. (GFS) from 2005 to 2010, a premier alliance of fleet leasing companies founded in 1994 offering comprehensive solutions to businesses worldwide. Carl has a BS in Accounting from LaSalle University. Carl and his wife Kim live in Moorestown, New Jersey.



Caleb White
Director
EBI

Caleb White joined the EBI Board in 2000 and subsequently held multiple senior management positions at EBI from 2006-2014 including EBI President and CEO which he held for nearly 8 years. Mr. White joined EBI from BP where he had worked in strategy, corporate development, finance and operations roles out of its London head office. Mr. White is currently a Principal at The Center for Applied Research (CFAR) and provides advisory services to family and owner-led businesses with a focus on governance, strategy, succession and change management. Mr. White is also an adjunct professor at Northeastern University where he teaches a course on family enterprise. Mr. White has a B.A. from Yale University and an MBA from the J.L. Kellogg Graduate School of Management at Northwestern University.

Speakers



Michael Ouellette
President
Starboard Advisors

Michael Ouellette joined Starboard Advisors in January of 2022 and serves as the company's President. Prior to Starboard Advisors, Mr. Ouellette was a family office executive for 26 years and representing family assets of over \$4 billion. Mr. Ouellette began his career with a four-generation family office based in Portland, Maine, serving as Executive Vice President and Treasurer of Dexter Enterprises, Inc. from 1997 to 2014. From 2014 to 2021, Mr. Ouellette served as CEO for Ten Mountain Capital, a two-generation family office based in Boston, Massachusetts. Mr. Ouellette continues to serve as an independent director and trustee for multiple families and also serves on the board of directors for both publicly-traded and privately-held companies.

Through his work, Mr. Ouellette has helped families implement best practices for family governance, next-gen education, investment management, cash management, estate and tax planning, and charitable initiatives. Mr. Ouellette's direct work experience includes: establishing family office governance structures; managing daily operations and staff; investment committee work including implementing investment mandates, manager/consultant selection, and investment performance monitoring; trustee and trust administration for hundreds of trusts; due diligence and oversight for private companies and real estate holdings; estate administration and ongoing estate planning and wealth transfer strategies; periodic tax planning for individuals, LLCs, and trusts; private foundation management and charitable giving; and developing and implementing family education curriculum for next generations.

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