



Best Practices on Deal Sourcing for Single Family Offices

Philip L. Edmunds, Vice President WayPoint Capital Partners

Prior to joining WayPoint Capital Partners, Philip was an Associate at DW Healthcare Partners, a healthcare services and technology-focused private equity firm with \$750 million in assets under management. At DW Healthcare Partners, Philip focused on making new platform investments and managing the fund's current portfolio. Prior to joining DW Healthcare Partners, Philip was a member of Deloitte Consulting's Merger & Acquisition Advisory Group, advising Fortune 500 clients on transactions across healthcare, technology, and a range of other industries. Philip holds a BA from the Kenyon College.

Benjamin Felt, Managing Director, Invus Group

Ben is a Managing Director based in the New York office. He joined Invus in 2009. Prior to joining Invus, Ben was a management consultant with The Boston Consulting Group in Chicago, where he worked with clients in a wide range of industries including consumer products, industrial goods, and financial services. Ben graduated with a BA in Economics from Yale University.

JJ Hearty, Principal, Freemark Partners

Freemark Partners is the private investment firm for the Marks family.

Our investment philosophy is simple: invest in great companies and never exit; and be the best partner for entrepreneurs, families, and management teams who seek patient capital to build their businesses over the long term. We are solely focused on the lower middle market (\$2-15m of cash flow / earnings).

We invest across 3 industries: niche industrial products & services; business services; and branded consumer products. Both U.S. and Canada.

Michael Landerer, Vice President, Dorilton Capital

Michael joined Dorilton Capital, a family equity office focused on control investments in the lower middle market in 2017. At Dorilton, Michael serves as a Vice President focused on new investments and bolt-on acquisitions for existing portfolio companies. Prior to Dorilton Capital, Michael worked at Greenhill & Co., advising clients across industries on mergers & acquisitions and restructuring transactions. Previously, Michael was a strategy consultant with Deloitte focused on corporate and marketing strategy assignments. Michael has an MBA from Harvard Business School and a BS in economics from Duke University. He lives in Brooklyn, NY.