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## AGENDA

- 9:30 a.m. Registration Opens
- 10:00 a.m. *Welcoming remarks, Diana Lawson, Dean Seidman College of Business and Kelli Olson, Tax Partner, BDO*
- 10:10 - 10:50 a.m. *Beyond Cryptocurrency: An Overview on Digital Assets*  
Speaker name, Position, Goldman Sachs
- 10:50 - 11:05 a.m. Q&A
- 11:05 - 11:45 a.m. *Investment Strategies in the blockchain / Cryptoasset Sector*  
Matthew Walsh, Co-founder and Partner, Caster Island Ventures
- 11:45 - 12:00 p.m. Q&A
- 12:00 - 1:00 p.m. Networking lunch
- 1:00 - 1:40 p.m. *Asset Allocation - What are the investment opportunities and risks?* Michael Liddy, Partner - Investments, Evanston Capital Management
- 1:40 - 1:55 p.m. Q&A
- 1:55 - 2:00 p.m. Concluding Remarks



Spring 2022 Seminar

## Cryptocurrency, Blockchain, and Digital Assets: Navigating Asset Allocation in the Cyberspace

Brought to you by the  
Family Owned Business Institute

May 20<sup>th</sup>, 2022

10:00 a.m. - 2:00 p.m.

Charles W. Loosemore Forum

Seidman College of Business

Grand Valley State University

50 Front Ave SW, Grand Rapids, MI 49504



## ABOUT FEFO

The Foundations Endowments and Family Offices (FEFO) is a collaboration between the Grand Valley State University, the Brooks Capital Management, The Council of Michigan Foundations, and the FEFO Steering committee members. FEFO supports family offices and foundation endowments in West Michigan by bringing together investment managers and advisors to share best practices on investing, learn about the unique challenges of managing family wealth, plan for optimal family legacy for future generations, and help develop asset management talent in the region

## FEFO STEERING COMMITTEE

Patrick Gaughan	Brooks Capital Management
Carrie Boer	Peter C. & Emajean Cook Foundation
Joel Bosch	42 North Partners
Greg Bosch	Brooks Capital Management
Ana Gonzalez	Grand Valley State University
Kevin Hoffmeyer	Goldman Sachs
John Kerschen	Charter Capital Partners
Kelli Olson	BDO
Joerg Picard	Grand Valley State University
Jennifer Romondino	Warner Norcross + Judd
Dan Van Timmeren	Kent Community Health Foundation
Randy VanAntwerp	Council of Michigan Foundations
Kathleen Vogelsang	Van Andel Institute
Jim Wiersma	FIRM, LLC
Steve Zlotnicki	Spectrum Health

## SPEAKERS



**Matt Walsh, Co-Founder and General Partner of Castle Island Ventures**

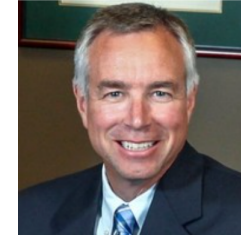
Castle Island Ventures is a venture capital firm on companies in the blockchain / cryptoasset sector. Prior to founding Castle Island Ventures, Matt was a Vice President at Fidelity Investments, where he led a number of the firm's blockchain R&D initiatives. While at Fidelity, he led the creation, operationalization and the investment strategy of a private fund focused on cryptoasset investments. Prior to Fidelity, Matt was a management consultant in the Private Equity practice at Arthur D. Little and worked in a corporate strategy role at iHeartMedia. Matt holds a BS in Business Administration from Babson College and an MBA from Duke University's Fuqua School of Business.



**Michael Liddy, Partner and General Investment Committee Member at Evanston Capital**

Jim Zwiers is President, Global Operations Group, and leads Wolverine Worldwide's portfolio-wide sourcing, logistics, distribution, customer service and information technology functions. He leads business development and is a member of the executive leadership team, as Executive Vice President. Jim has been with Wolverine Worldwide for 23 years, serving in many significant operational roles. He holds a Bachelor of Science degree in accountancy from Calvin University and a Juris Doctor degree in law from the University of Michigan.

## SPEAKERS



**Dan Van Timmeren, Partner and Senior Financial Advisor at LaFleur & Godfrey (Emcee)**

Dan Van Timmeren has more than three decades of experience in the financial services industry in the West Michigan area. Before joining the team at LaFleur & Godfrey in 2007, Dan served as CIO for Bayside Capital Management. Prior to his time at Bayside, Dan spent 13 years at First Michigan Bank Corporation, where he chaired the Corporate Investment Committee. Dan graduated with his BA in Finance from Michigan State University in 1983. He has sat on various charitable boards including the Kent Community Hospital Foundation and Grace Adventures.



**John Kerschen, Managing Partner and President, Charter Capital Partners (Emcee)**

John Kerschen has more than 25 years of financial experience in commercial banking, merger and acquisition advisory, and private capital investment. Since joining Charter in 1996, he has been responsible for more than 100 acquisition transactions with aggregate value of more than \$1 billion. These transactions include diverse industries, such as manufacturing of metal parts, plastics, electronics, and medical devices, as well as construction services, energy services, business services, and various distribution industries. John's significant banking and financial background combined with his strong transaction management skills have been instrumental to Charter's success over the years.

