



## Family Office Digital Asset Forum

February 3-5, 2025 | St. Petersburg, FL

### Speaker Biographies



**Lorenzo Abbatiello**  
Owner at Lorenzo Tax

Lorenzo Abbatiello has been at the forefront of the crypto revolution since 2016, helping clients navigate the complexities of this emerging space with strategic tax planning and financial guidance. With a solid foundation in accounting honed during his time at KPMG, Lorenzo has built a practice that bridges traditional finance with the innovation of cryptocurrency.

As his client base expanded, Lorenzo transformed his business into a fractionalized family office, offering a comprehensive suite of services tailored to the unique challenges of the crypto industry. With deep connections across legal, money management, tax planning, structuring, and M&A, he delivers sophisticated solutions to investors, entrepreneurs, and high-net-worth individuals, ensuring they stay ahead in a constantly evolving market.



**Bill Barhydt**  
Founder & CEO of Abra

Bill Barhydt is the Founder and CEO of Abra, a pioneering digital asset platform. A serial entrepreneur with deep expertise in fintech, payments, and consumer technology, Bill has been at the forefront of financial innovation for decades.

His career spans roles at Goldman Sachs, where he worked in fixed income, and Netscape, where he contributed to the early internet revolution. He also served as an Entrepreneur-in-Residence at Kleiner Perkins and began his career at NASA.

A visionary in digital assets, Bill delivered the first TED talk on Bitcoin in 2012, when bitcoin was trading at just \$5. He went on to create the world's first synthetic dollar/stablecoin based on Bitcoin in 2015. His contributions to technology and finance were recognized in 2000, when he received the first-ever Technology Pioneer Award from the World Economic Forum.

Today, Bill continues to drive innovation in digital finance, building solutions that bridge traditional and decentralized financial systems.



**Anthony Bassili**  
Head of Asset Allocators at Coinbase

Anthony Bassili, CAIA is Head of Family Office, Allocators & Tokenization for Coinbase Institutional. In this role, he is responsible for managing relationships with global financial institutions, advising on investment solutions related to digital asset exposure. His Clients include Single and Multi-Family Offices, RIAs, Endowments & Foundations, Consultants, Pensions, and Sovereign Wealth Funds globally. He also supports his clients with access to market leading hedge fund and venture strategies and advises firms on tokenization of traditional asset classes and industries. He advises Web3.0 startups and is an active early stage investor.

Prior to joining Coinbase, Mr. Bassili served as Head of Pensions for BlackRock iShares where he helped allocators develop active and niche strategies across public and private asset classes, including ESG and other thematic exposures. Prior to leading the iShares business, he spent more than a decade leading business development, investment strategy, and as a portfolio manager within the global trading platform at BlackRock. Mr. Bassili is a contributor to digital asset education with the AIF Institute Center for Financial Innovation, the Global Interdependence Center (GIC), and the Chartered Alternative Investment Management Association (CAIA).



**Javier Caceras**  
COO and Co-founder at Interim-CFOs

I'm Javier Caceres, Co-founder of Fortress Accounting, a firm specialized in demystifying the intricate world of accounting, finance, and tax for Web3 organizations. I bring to the table a rich professional experience of 20 years, spanning across various small to midsize companies where I led their accounting and finance operations. A decade ago, my interests led me to the crypto realm, where I took up the role of CFO for Wyre Inc, a leading figure in the crypto payments landscape at the time. This assignment marked my foray into the world of blockchain and cryptocurrency, setting the course for my career. Over the past four years, I've had the honor of helping companies in the web3 sector, overseeing their tax, accounting, and finance divisions. I am supported by a well rounded team of CPAs and financial experts, all of whom share my dedication to provide high-quality, tailor-made accounting and finance solutions, specifically crafted for startups. At Fortress, we acknowledge the unique financial hurdles that startups encounter, especially those at the series seed to series C stages. We offer a comprehensive suite of services, including CFO/controller services, bookkeeping/accounting, and tax, ensuring that we are equipped to manage all your financial requirements. Welcome to the world of Fortress, where we understand crypto, blockchain, and web3 as well as we understand accounting and finance.



**Gary Cardone**  
COB at NODE40, Co-Founder at N40 Digital Asset Alliance | CEO at Cardone Digital Ventures

Gary Cardone was born in Lake Charles, Louisiana. He graduated from McNeese University, where he studied Economics. After completing his education, Cardone played a crucial role in building a start-up called Natural Gas Clearinghouse in Houston, Tx. Within a short 6 years the firm expanded internationally and grew into the Fortune 30 - Dynegy (DYN).

Cardone's career at Dynegy took him to Europe, where he served as the President and CEO of Dynegy Europe. Here he aided the governments to reform the power and natural gas markets that are now known as the most stable energy markets in the world.

At the age of 41, Cardone retired from the energy industry and moved back to the United States. He co-founded Global Risk Technologies, where he focused on supporting tech startups. One of his notable investments was Chargebacks911, a company aimed at combating fraudulent chargebacks. Cardone played a significant role in expanding the company's international business, and he began exiting from the company in 2018.

In 2016, Cardone started investing in Bitcoin (BTC), which sparked his interest in blockchain technology and digital assets. In 2022, he invested in NODE40, a company focused on blockchain technology, where he currently holds the position of Chairman of the Board and Strategic Adviser.

Aside from his entrepreneurial ventures, Cardone is known for his passion for art, reading, and fishing. He currently resides in St. Pete, Florida, with his two daughters.



**Daniel Eborall**  
Global Director at IREX

Daniel Eborall is a trailblazing global intelligence expert and one of the foremost leaders in the ethical deployment of artificial intelligence. He holds the distinction of being the first graduate in the world to attain an MBA with an emphasis on Security Management, a testament to his pioneering approach to addressing modern security challenges. Renowned for his unparalleled expertise, Daniel has overseen artificial intelligence deployments on every continent, tailoring cutting-edge solutions to address critical needs across diverse environments. His profound impact on the intelligence community is evidenced by his instrumental role in drafting laws and regulations that establish best practices for AI use in surveillance and national security. Governments and organizations around the globe depend on his insights to navigate the rapidly evolving AI landscape responsibly and effectively. Daniel's ingenuity shines brightest in his work to protect the most vulnerable. He has created the world's most advanced technology solution for finding missing children, combining AI precision and human empathy to reunite families and save lives. This groundbreaking achievement has solidified his reputation as a transformative innovator in the field of intelligence. Having conquered the intelligence domain, Daniel has expanded his focus to financial automation, a cornerstone of digital transformation. Recognizing the strategic importance of this sector, he now collaborates with national leaders to design and implement robust automation tools that enhance efficiency and mitigate risks in payment processing and financial operations. Many nations now rely on his expertise to shape their long-term strategies, leveraging his visionary guidance to future-proof their economies in an increasingly digital world. Daniel Eborall's relentless dedication to advancing technology for societal good has made him a trusted advisor, a thought leader, and a driving force behind some of the most impactful AI solutions in history.

**Kelly Freis**

Partner at International Growth Capital | President, Steel Modular, Inc.

Kelly Freis is a seasoned investor and serial entrepreneur with over two decades of expertise spanning multiple sectors, with a dominant focus on real estate development, investment, and innovative capital stack strategies. As the Founder and Principal of International Growth Capital (IGC), Kelly has established herself as a leading authority in structuring sustainable business investments and facilitating strategic partnerships with Multi-Family Offices (MFOs).

With a proven track record of developing and managing projects valued at over \$2.5 billion across 10 states, Kelly's expertise encompasses commercial real estate development, sales, marketing, and comprehensive investment management. Her leadership in these areas is further solidified by her extensive network and her unwavering commitment to a better future.

Kelly also serves as the Founder and Chairperson of Steel Modular, Inc. (SMI), a pioneering, woman-owned enterprise delivering advanced steel fabrication and construction solutions. Under her leadership, SMI leverages cutting-edge, sustainable methodologies to address diverse project requirements, including affordable housing, tactical operations, defense contracting and storage.

In addition to her real estate and investment endeavors, Kelly brings a rich creative background to her business ventures. She spent 15 years in the entertainment industry as an award-winning producer, overseeing more than 50 films and 200 television episodes for industry leaders such as Disney, MGM, and The Food Network. As a voting member of the Academy of Television Arts & Sciences, Kelly combines creative acumen with entrepreneurial vision to achieve innovative and strategic outcomes. A Columbia University alum, and former member of the U.S. Ski Team, Kelly developed the discipline, resilience, and strategic focus that have helped her navigate under pressure, pursue excellence and deliver results time after time—qualities that have become hallmarks to her approach as an innovative leader in business and finance

**John Gillen**

Head of Fundamental Analysis and Market Research at TRU Capital

John Gillen spent six years on BlackRock's Aladdin platform in Client Services and Relationship Management. He specialized in the Front Office space, helping design and implement several tools for portfolio managers and risk officers. John studied The Economics of Digital Assets at The Wharton School of Business and has consulted for several successful projects as an expert on the Web3 space. He recently departed BlackRock to serve as the head of Fundamental Analysis and Market Research for Tru Capital, a fund offering actively managed exposure to digital assets.

**Norm Hannawa**

Head of Tax and Accounting Solutions, NODE40

Norm Hannawa is Head of Tax and Accounting Solutions at NODE40, which is a company that offers the industry's most comprehensive crypto data analytics for accounting, tax, and financial statement platforms to create an independent, verifiable audit trail. NODE40 serves accounting firms, investment funds and other institutions with expertise involving decentralized finance and digital asset high frequency trading.

Norm has more than 20 years of experience as a tax lawyer specializing in corporate, international and financial products tax issues. Norm leads NODE40's tax and accounting data solutions, including working with clients on specific tax and accounting data analyses, reviewing solutions for product enhancements related to tax and accounting, tracking various U.S. and international government regulations related to digital tax and accounting, and helping the leadership team develop new tax and accounting use cases. Prior to joining NODE40, Norm was a Director of Tax Strategy at Chainalysis Inc. where he worked on developing tax and accounting solutions involving blockchain data for governments and accounting firms. He was also a tax partner/principal at EY's Financial Services Office where he spent a decade advising corporations and investment funds on various tax aspects of cross-border transactions, financial products and reorganizations. Norm started his career as a law clerk to the Hon. Renato Beghe of the U.S. Tax Court in Washington, DC.



**Katherine Hill-Ritchie**

Founder, CIO & CEO, Private Capital Investments; Senior Director, TEDCO Venture Funds-The State of Maryland's Venture Capital Fund

Katherine has 23 years of finance and alternative investment experience in venture capital, private equity and with family offices. She is a frequent speaker and content provider to investment conferences and publications world-wide.

Katherine has worked for 8 family offices, and 4 Billionaires. Her work has expanded to also include advising companies and funds on their investments, due diligence, operations, fundraising and strategy. Her current roles: Senior Director of Venture Funds at TEDCO, Founder of Private Capital Investments, LLC, Board Member and Advisor Nottingham Spirk Family Office, Investment Committee for University Impact, and Head of the Investment Committee for Beyond Impact, Fund II. She is an early-stage Angel Investor, board member of Citrine Angels, and likes to focus on female and diverse founders, technology, and impact related companies.

Past roles: Simon Group Holdings, Eden Capital, PEX Global, Wedge Alternatives, Family Office Advisory Board - TriState Capital, Saad Family Office

Non-profit boards: Chair ACG New York Family Office Committee, ACG NY, Global Co-Chair The Guild, Philanthropy/Education Committees 100 Women in Finance, Fordham MBA Overseers Board

MBA Fordham University

BS Psychology University of Maryland

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**Shirley Hon**

Co-Founder at United Women's Sports NIL Agency

Shirley Hon is a seasoned professional with over 20 years of global experience across industries such as healthcare, oil & gas, sports, and OTT media. Recently, she served as Board Secretary and Chief Marketing Officer (CMO) at a Nasdaq-listed healthcare company in New York, where she played a pivotal role in strategic decision-making and enhancing corporate governance. Shirley has extensive management experience leading international teams from Canada, the USA, China, Hong Kong, Switzerland, and Finland. As a Canadian Chinese working in the US, she brings an international perspective and a strong business network.

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**Rajiv Kapoor**

Founding Partner at Chai Ventures

A strategic investor and entrepreneur who aims to bring a breath of fresh air to Venture Investing by unlocking the power of women. He is interested in spotting and supporting iconic female founders as a result of having 3 daughters and interacting with many talented women leaders throughout his career.

As the founding partner of Chai Ventures, a pre-Series A fund that invests in women-led businesses across industries, Rajiv works to develop a model for women-friendly VC at scale. Chai Ventures works towards leveling the playing field for women by investing in a community of iconic female founders across the themes of wellness, human connection, and a better world. Our unique mission creates a competitive advantage by supporting the next generation of VC investors. Since 2017, we have proudly invested in 50 women founders and counting!

Rajiv has a long history of investing in which he picked winners such as Tesla, Workday and Tableau in the public market and invested via early rounds in portfolio companies such as Compt, Hacware and Nomic. Rajiv also has proven skills in business operations given his participation in a successful IPO exit in 2013 and strategic acquisition in 2016. He has many years experience of strategically consulting on marketing, hiring and staffing and global structuring at over 100 companies including Microsoft and Pfizer.

**Jennifer Katrulya**

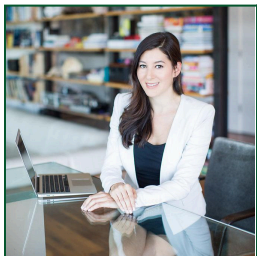
Co-Founder at N40 Digital Asset Alliance | CEO at NODE40

Jennifer Katrulya is the Chief Executive Officer at NODE40 Inc., a leader in compliance and reporting software for digital assets. In her role, Jennifer drives strategic direction, product expansion, and global operations. Her expertise in digital asset compliance and her vision for financial technology innovation are pivotal in positioning NODE40 at the forefront of addressing the complex regulatory challenges of cryptocurrencies. Prior to her current role, Jennifer served as a Partner at a major national advisory and accounting firm, where she led initiatives as the fractional CEO, COO, CMO, and VP of Business Development for a range of high-growth start-up and mid-market companies. She also provided transaction advisory services, valuation consulting, and project services for privately-held companies and family offices.

Jennifer has over 28 years of experience working extensively with private equity and venture capital firms, professional services, staffing companies, healthcare organizations, and high-growth technology companies across the United States and internationally. Jennifer is also the Founder and CEO of JenKat Consulting, a firm that specializes in providing advisory and CxO services for Single Family Offices, with a focus on supporting the entrepreneurial efforts of NextGen leaders. She contributes to the family office community as a thought leader, speaker, author, advisor, investor, and entrepreneur.

Jennifer's prior experience includes her role as a Practice Leader at a top Midwest CPA firm, and she was the co-founder of Block Small Business, a wholly owned subsidiary of H&R Block. Jennifer was also the owner of a highly successful CPA firm that provided accounting and advisory services to clients within the U.S. and internationally. Regarded as a "pioneer" in the outsourced accounting and advisory services space for the accounting profession, Jennifer was asked to be the founding writer, speaker, and thought leader for the CPA.com Trusted Business Advisor Program. In this role Jennifer delivered best practice advisory, regulatory guidance, and consulting services to many of the "Top 500" accounting firms across the country, and to their global networks. She has recently been asked to return to this role, advancing the focus on emerging trends, best practices, and regulatory updates for Digital Assets.

She has been recognized at one of the "Top 100 Most Influential People" by Accounting Today, and one of the "Top 25 Most Powerful Women in Accounting" by CPA Practice Advisor.

**Marissa Kim**

Head of Asset Management at Abra

Marissa Kim is the Head of Abra Private and Treasury, where she leads initiatives in digital asset management and alternative investments. She is also a General Partner at the Alternative Assets Opportunity Fund, focusing on strategic investments in emerging financial technologies.

Previously, Marissa was an investment lawyer at Skadden, Arps, where she worked with leading financial institutions such as BlackRock, Apollo, and Fortress. She has also played a key role in the Ripple/Xpring ecosystem fund, driving innovation in blockchain-based investments.

Marissa holds an M.B.A. from Columbia University and brings a wealth of experience at the intersection of finance, law, and digital assets.

**Kyle Lawrence**

Partner at Falcon Rappaport & Berkman, LLP

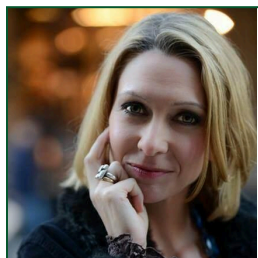
Kyle is a Partner with FRB's Corporate & Securities Practice Group, and with the Digital Assets Practice Group. Kyle's practice is focused on corporate and private securities matters, serving clients as lead counsel on all types of corporate transactions including private placements, mergers, acquisitions, joint ventures, corporate finance, planning and strategies, licensing, manufacturing, supply, and distribution arrangements. He provides dedicated hands-on personal support to clients from negotiation to closing and beyond.

Kyle regularly represents clients in a wide range of industries including telecommunications, food and nutraceutical manufacturing and distribution, restaurants, emerging technologies, retail, light manufacturing, commercial and private lending, architecture and software development. He also regularly advises private issuers and principals with respect to operations and compliance matters in his active private equity practice.

In mergers and acquisitions transactions, Kyle has regularly represented both buyers and sellers of businesses. Over the past 15 years, he has successfully closed numerous deals with business owners selling their businesses to strategic buyers, private equity funds, and private equity-backed strategic buyers both domestically and internationally. With respect to securities offering and financing transactions, Kyle has significant experience representing both issuers and founders on the one hand, and investors on the other hand, giving him years of experience related to private securities offerings, venture capital, and similar startup financings, and FINRA and SEC regulatory issues.

As part of the firm's Digital Assets Practice Group, Kyle's practice has expanded to include advising companies on blockchain, cryptocurrency, Web3, and NFT matters, with a focus on how the corporate and securities matters affect these types of projects.

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**Heidi Lehmann**  
Strategic Director at Ligo Partners

Heidi Lehmann is an entrepreneur, board director, and investor with 20+ years of experience scaling ventures and creating impact at the intersection of innovation and capital. Currently, Heidi is focused on connecting family offices—set to outpace VC and PE by 2030—with large-scale opportunities in energy transition, climate tech, AI data compute, and critical materials.

As Strategic Director of Investments at a Miami- and New York-based family office, she helps deploy capital across climate, infrastructure, healthcare, and manufacturing, leveraging a global network that has invested \$500M in 80+ companies since 2022. Heidi is also the founder of Heartland Futures Lab, advancing investment in strategic, durable Heartland opportunities such as critical materials, sustainability, infrastructure, and AI data compute. She is Key Personnel and a Business Advisor to Critical Materials Crossroads and co-founded the KC Futures DAO to elevate strategic Kansas City opportunities on the global stage. Additionally, Heidi serves as a Tiger21 Chair, fostering peer-to-peer learning among ultra-high-net-worth individuals.

Previously, Heidi co-founded ventures such as Kenzen (IoT workforce safety, \$30M raised), Third Screen Media (acquired by AOL for \$105M), and SWSI Media (acquired by Viacom/CBS). She serves on boards and advises startups and funds like Glasswing Ventures (AI/Cybersecurity) and Gaingels (LGBT founders). Heidi has been recognized as one of the TechWeek 100 Most Influential People in Tech, a Woman to Watch in Retail, and a Woman of Influence by the New York Business Journal.

Her work has been featured in publications such as Forbes, The Wall Street Journal, and The New York Times, among others. She has also spoken at premier global events, including SXSW, Mobile World Congress, and the National NGLCC Conference, sharing her expertise on innovation, technology, and investment.

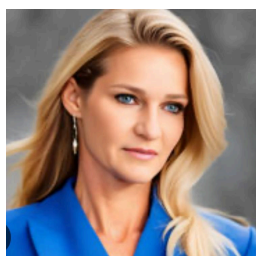
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**Sam Leichman**  
Blockchain Practice Lead at Propeller Industries

Sam leads the Blockchain Practice Area at Propeller Industries. Propeller provides 'full stack' CFO and accounting outsourced services to VC backed startups and is currently working with over 50 clients in its Crypto/Web3 vertical including Optimism, cLabs, Figment, POAP, and VeeFriends. Sam and his team focus on translating on-chain activity to actionable GAAP financials and providing clients with a full liquidity picture via crypto treasury analysis. Sam also founded the Statement of Digital Assets (SoDA) public benefit collaboration. SoDA is a standardized reporting methodology that bridges Generally Accepted Accounting Principles (GAAP) balance sheet reporting with on-chain holdings.

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**Sparrow Mahoney**  
CEO at STaX Capital

Sparrow Mahoney is a serial entrepreneur, angel investor, and award-winning motivational speaker with over two decades of experience building, scaling, and successfully exiting companies. Specializing in tech innovation, health and wellness ventures, and enterprise blockchain strategies, Sparrow has achieved four successful exits across diverse industries, including Fastbite.com, MedicalTourism.com, and RunWhere - sold to Ironman.

A passionate advocate for women-owned businesses and a champion of social and environmental solutions, Sparrow is deeply involved in frontier energy partnerships, large-scale bitcoin mining, and un-stranding energy assets. She brings unparalleled expertise in capital acquisition, strategy design, and super-capital specialization through her role as Managing Partner at STaX Capital Partners.

Sparrow also serves as Founder and Executive Director of the Alaska Blockchain Association, as well as Founding Partner of Unit18 Capital, which focuses on dual-use military technology. Her consulting work includes advising Coinchange and multiple venture capital funds across the US and Europe.

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**Rob Massey**

Global Tax Leader - Blockchain and Cryptocurrency at Deloitte

Rob Massey is the Tax leader of Deloitte’s Blockchain and Digital Assets practice. Since 2012, Rob has focused on the complex world of blockchain, digital assets, cryptocurrencies, and tokenization, serving over 1,000 clients across the ecosystem. This includes investors, miners, staking providers, payment processors, wallet hosts, exchanges, custodians, hedge funds, DAOs, and entities involved in protocol development.

With over two decades of experience in tax consulting for technology companies, his expertise spans the complex tax considerations of blockchain enabled transactions and the tax impacts of tokenization and digital asset transactions across business models, industries, and geographies. He also has growing expertise in tax controversy matters involving digital assets and blockchain based business models.

As the first person from Deloitte to work in blockchain and digital assets, Rob has been instrumental in growing the practice into a global powerhouse. Not only has his visionary leadership positioned Deloitte at the forefront of the industry, but also established Rob as a highly respected speaker at industry events worldwide. His presentations often cover a range of topics, from the evolving blockchain and digital assets ecosystem and future technology directions to the complex tax implications faced by corporations in the digital asset space.

Rob (and co-Author Conor O’Brien) worked with 50 other tax specialists in Deloitte to produce Bloomberg BNA’s Tax Management Portfolio, Taxation of Cryptocurrency and Other Digital Assets, No. 190-2nd. This 400-page tax treatise examines U.S. federal and state income taxation of digital assets, including cryptocurrencies, providing a detailed analysis of the classification of digital assets for tax purposes. It offers an inclusive overview of the digital asset ecosystem, tax guidance to date, tax classification, and accounting treatment. The portfolio further delves into the tax implications of using, dealing, trading, and investing in digital assets, and addresses novel tax questions raised by digital asset transactions.

Beyond his professional achievements, Rob’s passion for fitness and sailing underscores his belief in the importance of wellness for himself and his team – a value captured by his favorite motto, “Proof of Wellness”. As an active member in his local community, Rob volunteers and offers his time as an advisor to Digital Dollar Foundation, as the Tax Task Force Chair for the Chamber of Digital Commerce, and as the President and Site Manager of Tax-Aid.



**Ankit Mehta**

Co-Founder & CEO at Receipts Depository Corporation (RDC)

Ankit Mehta is co-founder and CEO of Receipts Depository Corporation (RDC), the first depository issuing depository receipts (DRs) on digital and alternative assets, enabling a cheaper, more efficient way for qualifying investors to own assets. Prior to co-founding RDC, Ankit served as the Global DR Product and Capital Markets Head at Citi, where he managed relationships with issuers, investors, and intermediaries. Ankit holds an MBA from Columbia Business School.



**Vince Molinari**

Founder & CEO at FINTECH.TV

Vince Molinari is the Founder and CEO of FINTECH.TV, PBC, a global media company dedicated to fintech, blockchain, the UN Sustainable Development Goals (SDGs), and impact investing. He has led several U.S. financial services broker-dealers and alternative trading systems. A recognized thought leader, Vince focuses on modernizing securities law and leveraging technology to drive innovation. He is a frequent speaker on market infrastructure, capital formation, blockchain, digital assets, impact investing, and The JOBS Act. Vince serves on the Digital Assets Board for the U.S. Chamber of Commerce’s Center for Capital Markets Competitiveness. He is also Co-Founder and Co-Chair of the Blockchain Commission for Sustainable Development and Blockchain for Impact, launched at the UN General Assembly in 2017.



**Ed Nwokedi**  
Founder & CEO at RedSwan CRE

Edward Nwokedi is the Founder and CEO of RedSwan CRE Marketplace ("RedSwan"). RedSwan is a leading commercial real estate platform for asset-backed securities. With over \$9B in tokenized real estate assets, RedSwan is a global market leader with full SEC/ FINRA membership approval through its wholly owned division, RedSwan Markets, a broker-dealer entity. This allows our team to legally issue, sell, and trade in digital securities of commercial real estate shares from its digital marketplace platform. Ed started his 23-year real estate journey at Colliers International and moved to Cushman and Wakefield, Texas, rising to Executive Director of Capital Markets, culminating in more than \$2.7B in multifamily sales. Mr.

Nwokedi received his M.B.A. from St. Mary's College of California in Moraga, California, and his B.S. in Accounting and Organizational Behavior from the University of Michigan in Ann Arbor, Michigan. He holds a CCIM designation and is on the advisory board of the Bauer Real Estate Program at the University of Houston's C.T Bauer College of Business.

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**Moish Peltz**  
Partner at Falcon Rappaport & Berkman, LLP

Moish co-chairs FRB's Digital Assets Practice Group and chairs FRB's Intellectual Property Practice Group. Moish oversees coordination between the Digital Asset Practice Group and all other practice groups of the firm, to ensure that the firm's clients receive the benefit of FRB's full-service approach, custom tailored to the unique issues presented by the blockchain industry. Moish also advises numerous venture technology companies on emerging technology and blockchain matters, with a focus on the intersection of IP and blockchain. Moish has been advising cryptocurrency ventures since 2014, and combines his knowledge of the blockchain with a decade of IP and business law experience where he

helps entrepreneurs grow their businesses and brands and resolve disputes.

Moish has been quoted in numerous publications on NFT- and blockchain-related matters, including: The Washington Post, NPR's All Things Considered, Time, CoinDesk, ABA Journal, LA Magazine, TheStreet, The Verge, DLNews, and Law360. He has also presented at numerous conferences and webinars on related topics.

Moish's practice encompasses both transactional and business litigation matters. His practice also focuses on U.S. and worldwide trademark prosecution and enforcement, including litigation before the Trademark Trial and Appeal Board (TTAB). His previous experience includes working at a premier IP law firm where he acted as trial counsel in numerous contested IP matters before U.S. District Courts and Courts of Appeal.

Moish has worked across numerous industries, including technology, energy and renewable energy, entertainment, media, and advertising, real estate, hospitality, education, cryptocurrency and NFTs, artificial intelligence (AI), legal cannabis (including hemp and CBD), and medical/health care. He has assisted entrepreneurs, artists, and non-profits with their various legal needs.

When not practicing law, Moish enjoys playing saxophone, creating music, and collecting NFTs. He enjoys reading non-fiction and follows the latest trends in internet and technology law. He lives in the NY Metro area with his wife and three children.

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**Chris Pizzo**  
Investment Committee Member Member of the General Partner

Chris is an investment principal of the ARK Digital Asset Innovation Fund. He oversees fundraising initiatives, cultivates and maintains investor relationships, and manages the end-to-end investment lifecycle, including deal sourcing, selection, and strategic post-funding support to portfolio companies. Chris is the co-founder of Druid Ventures, the first digital asset-focused venture capital fund in the Tampa Bay, Florida area. He launched Druid Ventures in 2022 with the initial goal of raising a \$2 million fund, but it quickly grew to approximately \$13 million before closing. Prior to co-founding Druid Ventures, Chris served as a Principal at SCP & CO, where he focused on private investments in technology and

healthcare. He was also the Corporate Secretary of SCP & CO Healthcare Acquisition Company, a \$230 million publicly traded SPAC on the Nasdaq that was focused on digital health investments from January 2021 to November 2022. Chris has a background in investing in and working with companies to help shape their goals and drive their success. Before joining SCP & CO, he co-developed and managed the coaching and corporate partnership programs at Embarc Collective, a Tampa-based innovation hub spearheaded by Jeff Vinik and Lakshmi Shenoy. In this role, he oversaw support for 44 early-stage technology companies by managing a team of cross disciplinary coaches (data analytics & engineering, sales, marketing, business development, talent recruiting, fundraising, leadership, and mental health), and he directly coached 21 startups. From 2015 – 2018, Chris held the position of Associate at Murray Bertron, LLC, a family office based in Tampa. While there, he divided his time between working with portfolio companies on operational improvements and sourcing and executing new transactions. This experience included deal origination and screening, structuring deal financing, due diligence, portfolio company monitoring, and investor correspondence. Prior to his work at Murray Bertron, Chris co-founded VitalStream Networks in 2013, a remote patient monitoring company that

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sought to reduce hospital readmissions and achieve the quadruple aim. Chris holds a Bachelor's degree in commerce and business administration from the University of Alabama and a Master's degree in Entrepreneurship in Applied Technologies from the University of South Florida. He is an active supporter of the entrepreneur programs at the University of South Florida (on the Board of Advisors for the Nault Center of Entrepreneurship), University of Tampa, and the University of Florida.

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**Mike Revy**  
CEO at Bulla Networks

With a background in Linguistics and Computer Science from UCLA, Mike began his career bridging technology and business, customizing IT platforms and integrating them with accounting systems for small businesses. This passion for problem-solving led to an IT role on Wall Street, which eventually transitioned into trading.

The 2008 financial crisis, marked by the collapse of Lehman Brothers, became a turning point—fueling a deep interest in decentralized systems. Early exposure to bitcoin laid the foundation, and by 2017, Ethereum's smart contract capabilities reignited his coding journey. Dusting off his Computer Science expertise, he immersed himself in Solidity development.

Today, as the founder of a firm dedicated to Web3 innovation, Mike is building financial primitives that form the backbone of the decentralized economy.

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**Alexander Ritchie**  
Principal & General Counsel at Private Capital Investments, LLC

Alexander Ritchie is principal and general counsel of Private Capital Investments, LLC. He has extensive experience representing corporate and individual clients in their U.S. and international businesses and personal interests. He has sourced and structured deals and has performed on-site due diligence internationally for U.S. and international family offices, startups, and entrepreneurs. He has assisted individuals with trusts and estates, as well as asset protection, asset recovery, and complex estate liquidation. Past deals have focused upon direct investment and expansion opportunities including agriculture, hospitality, biotechnology, entertainment businesses, real estate, consumer products, manufacturing, medical devices, logistics, and infrastructure. He currently works with family offices on investment strategy, deal sourcing, and strategic partnerships. He also researches and advises investors on legal issues and opportunities in the digital asset ecosystem. Alexander managed the family office of his own family and served as general counsel for a U.S. family office in Nevada and Geneva, Switzerland. He is licensed to practice law in the states of New York and California. He has authored articles on subjects including art law, securities regulation, and family offices.

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**Sean Ryan**  
Co-Founder and CTO at NODE40 | Co-Founder at N40 Digital Asset Alliance

Sean Ryan launched his career in early 2002, after earning a Bachelor's degree in Computer Science from SUNY Albany. His early work as an academic researcher focused on information retrieval and natural language processing (NLP), with projects supported by DARPA grants to aid the U.S. intelligence community in the aftermath of 9/11.

While advancing these initiatives, Sean completed a Master's degree in Information Science (MSIS) at SUNY Albany. During this time, he also served as an adjunct professor at a local community college, teaching advanced courses in programming, business intelligence, and software design until 2010.

In 2005, Sean transitioned into public service as a software engineer for New York State. Over six years, he designed and developed mission-critical systems supporting employment management operations statewide.

In 2011, Sean shifted to private consulting, tackling diverse technical challenges across industries. His adaptability and problem-solving skills established him as a sought-after engineer.

By 2013, Sean had entered the non-profit healthcare sector, applying his expertise to innovative technology solutions. Two years later, he co-founded NODE40 with Perry Woodin, pioneering efforts in digital currency and blockchain technology.

As CTO and Head of Product at NODE40, Sean leads the development of the company's flagship product, NODE40 Balance. Initially, NODE40 operated the first cryptocurrency staking platform in the industry, managing hundreds of blockchain nodes and accepting payments exclusively in digital currency. This posed unique challenges in tracking crypto transactions and calculating gains and losses. Sean spearheaded the creation of sophisticated accounting practices, laying the foundation for NODE40's evolution into blockchain analytics.

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Today, NODE40 focuses on providing cutting-edge tools for individuals and companies navigating the complexities of blockchain activity. Under Sean's leadership, the company has adapted to a dynamic landscape, evolving from simple value transfers to NFTs, DeFi, and modern ETFs.

A recognized thought leader in the blockchain space, Sean has been quoted on cryptocurrency tax regulations, featured on podcasts, and authored technical case studies highlighting the nuances of various blockchains and their compliance challenges.

In 2019, Sean was named one of CPA Practice Advisor's 20 Under 40 Influencers in accounting technology, and NODE40 Balance was a finalist in the prestigious Technology Innovation Awards. In 2024, Sean's expertise helped shape NODE40's contributions to the final U.S. Treasury regulations on cryptocurrency, cementing the company's role as a leader in regulatory compliance.

Sean continues to drive innovation and excellence at NODE40, ensuring its solutions remain aligned with evolving regulatory demands and industry expectations.

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**Alysse Soll**

CEO Advisory at underdog venture team

ALYSSE SOLL – CEO underdog advisory, Chair Emeritus WiST (Women in Sports Tech) Alysse Soll is the CEO of underdog advisory, the investment arm of underdog venture team, a sports centric venture studio. In this role, she leads underdog's efforts in sourcing, investing, advising, and fundraising for startups across the sports ecosystem, with a mission to support female and BIPOC founders. Alysse is a 17-year veteran of the National Hockey League, launching the San Jose Sharks in 1990, where she pioneered fan acquisition platforms adopted by all NHL teams and other North American professional leagues. Prior to her role at underdog venture team, she was President of NewModel Advisory, a boutique sports innovation consultancy which connects sports tech start ups with sports properties across the globe. Alysse was recognized by SBJ as one of the 2022 Power Players in Sports Technology. She is an Angel investor, capital fundraiser and M&A for sports tech startups (pre-seed through Series A), and a certified (Series 7, Series 63) FINRA registered representative. Alysse is actively engaged as an advisor across the startup sports technology ecosystem and serves as a judge and mentor for Sports Tech and Innovation Accelerators across North America and internationally. Alysse serves on non-profit Boards, Chair Emeritus of WIST (Women in Sports Tech) and Deal CoChair of the Harvard Business School Alumni Angels. Alysse serves on corporate Boards including Healium, a health and wellness tech company and Zoomph, a sports analytics company. Alysse is a graduate of Cornell University with a BA in Japanese Studies and Harvard Business School, Advanced Management.

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**Shawn Springs**

CEO at Windpact, Entrepreneur | Inventor | Former NFL Star

Shawn Springs is a visionary entrepreneur and inventor whose work in impact protection technology has transformed industries ranging from sports to military safety. As the creator of the award-winning Crash Cloud™ system—recognized by the Smithsonian's National Museum of American History and the USPTO Invention Hall of Fame—Shawn has demonstrated a commitment to innovation that saves lives and advances industries. A former NFL standout, Shawn played 13 seasons for the Seattle Seahawks, Washington Commanders, and New England Patriots. Drafted third overall in 1997, he remains the highest-drafted cornerback in NFL history and earned a Hall of Fame nomination in 2015. Today, Shawn is the founder of Windpact, an impact protection company, and InnateIQ, an AI-driven platform for manufacturers. His entrepreneurial ventures, coupled with his investments and advisory roles, focus on fostering innovation, diversity, and equity in technology and business. Shawn's achievements on and off the field make him a sought-after speaker on topics such as innovation, safety technology, leadership, and the journey from athlete to entrepreneur. His TEDx talk, "Tackling Helmet Protection Head On," reflects his passion for advancing safety standards worldwide.

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**Hadley Stern**

Chief Commercial Officer at Marinade

I am the Chief Commercial Officer (CCO) of Marinade, a leading company in the Solana DeFi ecosystem that has built the chain's first and most robust non-custodial native staking protocol. I help TradFi institutions explore, then decide how to benefit from the innovation happening on Solana.

I've been working in crypto assets and blockchain (for institutions and for startups/scaleups), since 2014 when I was SVP of Fidelity Labs. This is Fidelity's in-house technology incubator where, from 2007 onwards, I led the design, development and product management teams to research and pilot several emerging technologies for our business divisions, including wearable computing, VR/AR, mobile applications (including the company's first-ever app and app brokerage), AI, and others.

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I knew then that blockchain and cryptocurrencies would become increasingly relevant to global finance, and, at the behest of senior management, I began the company's blockchain-specific incubator and digital currency group as SVP of the newly minted Bitcoin Incubator. Here, we developed Fidelity's earliest digital asset products, including the ability to donate bitcoin to Fidelity Charitable, as well as launching Fidelity's first bitcoin mining operation. These early successes put Fidelity on the map as one of the only institutions embracing crypto, which led me to join and help build Fidelity's Digital Asset Services division in 2016. This brought the firm fully into the web3 world with several digital asset-related products and services, including the trading and custody of digital assets.

Eager to bring more institutions on board, I jumped to the service side in 2018 to become COO at the blockchain infrastructure company Bloq, where I helped the firm significantly boost its revenue and diversify its product roadmap for enterprises. After Bloq, I headed up the AWS Innovation Lab, which allowed me to work with global brands on technological experimentation and deployment - and re-explore other emerging technologies, including AI, quantum computing, and others. From there, I was recruited to lead global digital asset custody for the Bank of New York Mellon (BNYM), where we launched the industry's first bank-grade platform for digital asset custody (on bitcoin and Ethereum).



**Ben Taylor**  
Co-Founder & CEO, SoftLedger

Ben is the CEO & Co-Founder of SoftLedger, a general ledger designed for companies with multiple entities and complex reporting requirements. A CPA with more than ten years of varied public and private accounting experience, Ben has led many complex financial projects to successful outcomes. He began his career at Ernst & Young, followed by in-house management roles at Fannie Mae and other public companies.



**Lorenzo Valente**  
Director of Digital Assets at ARK Invest

Lorenzo joined ARK in March 2024, and oversees research efforts for the fund. His focus on the long tail of digital assets, including research in layer ones and other DeFi tokens, positions him to evaluate groundbreaking opportunities in the digital asset ecosystem. Prior to ARK, Lorenzo spearheaded business development initiatives for three years at two blockchain startups, Zebec Labs and Chainflip Labs. Prior to his involvement in the startup ecosystem, he was an Investment Analyst at CTF Capital, a crypto investment fund that specialized in liquid token investments and yield generating strategies. Lorenzo's entrepreneurial journey began in 2018 with founding his own startup, an OTC desk that facilitated the acquisition of Bitcoin, Ethereum, and several stablecoins for small institutions and retail users. Lorenzo's academic background is in mechanical engineering, having earned his Master's degree from the Buenos Aires Institute of Technology (Instituto tecnologico de Buenos Aires). This followed his undergraduate studies that started at the École Polytechnique Fédérale de Lausanne, in Switzerland.



**Consuelo Vanderbilt**  
CEO and Co-Founder at SohoMuse

Consuelo Vanderbilt Costin is a seventh-generation descendant of the legendary shipping and railroad tycoon, Cornelius Vanderbilt. She is a multifaceted American singer, composer, songwriter, designer, actress, philanthropist, and entrepreneur.

From a young age, Consuelo pursued her passion for music, studying under renowned vocal coaches such as Ron Anderson and Seth Riggs. She further honed her craft in Italy, studying music in Fiesole and performing in local cafes and restaurants in Florence. At 21, she signed her first record deal in London, embarking on a journey that would take her across the globe. Her career has seen her perform in countries such as Germany, France, and Australia. Eventually, Consuelo launched her own record label, C&R Productions, which catapulted her to the top 20 of the Billboard Dance Charts. Her debut single, "Naked," spent an impressive 16 weeks on the charts, and her follow-up, "Feel So Alive," earned her Billboard's #2 Breakout Artist honor. Her latest hit, "Body Needs," broke into the Top 5.

In addition to her music career, Consuelo has proven to be a successful entrepreneur. In 2015, she released a jewelry collection inspired by Vanderbilt family heirlooms on HSN, titled the Homage line, which honors her prestigious family history. Her entrepreneurial spirit also led her to co-found SohoMuse, a member-driven social networking platform for creative professionals. Launched in 2017, SohoMuse allows creatives across the globe to network and collaborate in various industries. The platform has

garnered thousands of members, including internationally recognized designers, artists, musicians, and directors. SohoMuse has facilitated collaborations for major events like New York and London Fashion Weeks, as well as television and film productions.

Consuelo's commitment to fostering creativity and addressing important societal issues is evident in her Virtual Entertainment Series, "SohoMuse Presents VOICES." The series brings together creatives from multiple industries to discuss pressing topics such as women's rights, diversity, and more. Notable collaborators have included Linda Perry, Ja Rule, Doug E. Fresh, and NBA icon Isiah Thomas.

Beyond her creative endeavors, Consuelo is deeply involved in philanthropy. She serves on the board of the Vanderbilt Museum and the Ovarian Cancer Coalition of Greater California, and she is actively engaged with the American Heart Association. Her many accomplishments have earned her recognition in prominent publications like Vogue, Town & Country, Prestige, PAPER, and Raine Magazine.



**Jeffrey Verdon**

Partner at Falcon Rappaport & Berkman, LLP

Jeffrey M. Verdon is a Partner and Chair of the Asset Protection Practice Group at Falcon Rappaport & Berkman LLP, a NY based full-service law firm, working from the Newport Beach, CA offices. He has been practicing law in the areas of taxation and integrated estate planning with asset protection, having received his Master of Laws (LL.M. Taxation) from Boston University in 1979.

Jeffrey's practice is national in scope, including many clients overseas. He is one of the early pioneers in integrating asset protection planning with advanced estate planning to preserve his affluent client's legacy from financially ruinous lawsuits and other third-party claims, since 1985.

Jeffrey is the author of Estate Planning for Women Only, now in its 4th edition, as well as over 25 articles with Kiplinger.com. Jeffrey is also a regular contributor to the Orange County Business Journal.

In addition to his practice, Jeff Verdon is a highly sought-after speaker by professional organizations and financial conferences addressing the subject of asset protection planning. He regularly lectures aboard luxury cruise ships, and at top Investment Conferences both in the US and Internationally.



**Joe Woodard**

CEO at Woodard

Woodard provides professional accountants with education, coaching, resources, networking communities, and consulting services, all built around Woodard's Ideal Practice Model™. Woodard also provides accounting and fintech software developers with marketing programs and consulting services, designed to expand our client's reach within the professional accountant segment.



**Perry Woodin**

Co-Founder and CIO at NODE40 | Co-Founder at N40 Digital Asset Alliance

Perry Woodin is a pioneering figure in the blockchain industry, whose interest in digital currencies was ignited in 2012. Motivated by the innovative financial incentives that cryptocurrencies offer to encourage network participation, he delved into early Bitcoin mining and staking. He served as a Trust Protector for Dash, one of the first decentralized autonomous organizations (DAOs), and continues to contribute to several advisory committees.

In 2015, Perry co-founded NODE40, the first cryptocurrency staking company, enhancing blockchain infrastructure stability by hosting collateralized nodes. Recognizing the growing need for sophisticated financial data solutions for cryptocurrency transactions, he spearheaded the launch of NODE40 Balance in 2018.

As Chief Innovation Officer at NODE40, Perry leads the company's evolution, ensuring its solutions remain at the forefront of the digital asset space. Under his guidance, NODE40 has become a trusted resource for financial professionals and institutions, offering advanced tools that simplify cryptocurrency compliance and reporting in an ever-changing regulatory environment.



**Todd Ziegler**  
CEO at Truck Coin Swap (TCS)

Todd Ziegler (JD) is a decade-long c-suite transportation veteran. As CEO of TCS, Ziegler is leading the campaign to make blockchain settlement the future of transportation trade finance. TCS settles freight receivables onchain in 1-2 business days, up to 90% cheaper than invoice "factoring." TCS is a main street use case for digital assets that's solved the largest problem in North American supply chains - an industry valued at nearly \$3T in commercial paper volume.