Hedge Fund Marketing Bootcamp

November 10, 2011 at 12:30 PM
San Francisco CA

Join us for a half day, hands on workshop, consisting of hands on pitch book creation, an investor panel, and networking cocktail.

The event consists of:
- 2 hours of hands on workshop with a focus on brand identity, marketing messages, and consolidating and formatting to have high impact materials.
- One hour speaker panel to discuss what investors are looking for in marketing materials.
- 30 minute discussion on how to avoid compliance pitfalls
- Post event networking with the speakers

Early registration is $675 until 10/27. Space is limited.

Participants

Maital Rasmussen, *Moderator*, Rasumssen Communications
Seavan Sternheim, QM Capital
Kermit Claytor, Fund Principal
Paul R. Perez, CFA, Springcreek Advisors, LLC
Ildiko Duckor, Pillsbury Winthrop Shaw Pittman, LLP
T. Jon Williams, Ph.D., CFA, South Avenue Investment Partner

Event Details

Date: November 10, 2011
Time: 12:30 PM Registration.
We will begin *promptly* at 12:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.
Networking and cocktails will follow.
Host: Pillsbury Winthrop Shaw Pittman LLP
Location: 50 Fremont Street, San Francisco, CA 94105 - Directions
RSVP: RSVP Now

If you have any questions about this event, please contact North California Committee

This event is NOT FOR ATTRIBUTION.

Space is limited. No walk-ins will be permitted.

Biographies

Maital Rasmussen, Marketing Strategist, Rasumssen Communications
Maital S. Rasmussen is the founder and CEO of Rasmussen Communications, Inc. She is a marketing leader with a fifteen-year global track record in creating measurable, results-driven programs. Maital believes that each client has an original story to tell, and she identifies and communicates that story from a unique angle. Her areas of expertise are marketing strategy and corporate communications for financial services, start ups, non-profits, Fortune 100 and professional services. Her proven experience gives her the edge in driving new businesses, both domestically and internationally, as well as the innovative use of marketing technologies.

Maital entered the field with rapid growth high tech start-ups, and worked her way up to Vice President at JPMorgan as a Global Marketing Manager and a Senior Relationship Manager. After several years in JPMorgan's New York headquarters, Maital led the establishment of JPMC's Escrow Services division in San Francisco.

Seavan Sternheim, COO, CMO, QM Capital
Mr. Seavan Sternheim joined QM Capital in 2006 and is responsible for all operations and client relations. Prior to joining QM Capital, Mr. Sternheim was Vice President at Silicon Valley Bank, managing a $275 million portfolio of VC and PE clients. He is a member of the finance committee for the Jewish Federation of Silicon Valley and is a board member for the Jewish Sports Hall of Fame of Northern California. Mr. Sternheim earned an M.B.A. from Santa Clara University and a B.S. in Finance from Lehigh University. He also holds a Series 65 license.

Kermit Claytor, Fund Principal, Fund Principal
Kermit Claytor, Fund Principal of Skyline Partners, fund of hedge funds, has over two decades of investing and analytical experience and over 15 years as an analyst and advisor to hedge fund investors. In his role as the Founder and Principal of King's Mountain Capital Group, LLC, since 1993, he was responsible for the management of the portfolio, including initial screening and vetting of prospective hedge funds, and designing and implementing due diligence. As an advisor to individuals, families, private trusts, funds-of-funds, and other institutional clients, he has examined and participated in thousands of hedge fund transactions.

He has overseen the construction and management of generally-diversified hedge fund portfolios, as well as sector-specific portfolios. Mr. Claytor has gained market research experience as a Credit Analyst with the Federal Reserve Bank of San Francisco, a Market Analyst with S&P/MMS International, and the North American Representative with Fund Advisors, Ltd.

Paul R. Perez, CFA, CEO, CIO, Springcreek Advisors, LLC
Paul Perez has been in the investment management business since 1987. He currently is the CEO (Acting) and CIO of Springcreek Advisors, a registered investment advisor and multi-family office. Previously, Paul was CIO of Lyon Ventures LLC (a family office investing solely in alternative strategies) and The Scion Group LLC (a family office allocating both to traditional and alternative investment managers). Other positions previously held by Paul held were Managing Director at Northern Trust, Director of Strategic Initiatives at HRJ Capital (a $2.4 billion AUM sponsor of alternative funds of funds), Managing Director of the U.S. Trust Company of New York, head of portfolio management at Credit Suisse Private Banking (New York), and portfolio manager at Bankers Trust Company (New York).

Paul serves on the Board of Advisors of HG Capital, a real estate private equity firm, and of Tynt, a technology firm. Previously, Paul served on the Board of Directors of Springcreek Advisors, on the Board of Advisors of RCM, an Allianz Global Investors Company, and as an Advisor to Pemigewassett Partners.

Ildiko Duckor, Counsel, Pillsbury Winthrop Shaw Pittman, LLP
Ms. Duckor practices in Pillsbury's Corporate & Securities area, and is a senior member of Pillsbury's Investment Funds & Investment Management practice group. Her practice focuses on hedge funds and investment management regulation. She provides strategic and legal advice for start-up investment advisory businesses and up-and running investment managers ranging from small advisers to those with hundreds of millions in assets under management.

Ms. Duckor counsels on a wide range of legal issues and regulatory compliance matters related to the structuring, formation and management of registered and unregistered investment advisory firms and domestic and offshore hedge funds and fund groups. Ms Duckor also has extensive experience preparing and negotiating agreements for various investment management, managed account and sub advisory arrangements, and negotiating on managers' behalf investments by institutional investors ("side letters") and 'seed' capital arrangements.

Prior to joining Pillsbury, Ms. Duckor practiced in the investment management groups with the law firms of Schulte Roth & Zabel LLP in New York and Howard Rice Nemerovski Canady Falk & Rabkin in San Francisco, and served as in-house counsel for Barclays Global Investors, N.A. She serves on the programming committee of the Association of Women in Alternative Investing.

T. Jon Williams, Ph.D., CFA, South Avenue Investment Partner
Jon Williams has spent his entire career in the investment management business developing a specialty in advising institutions, families and individuals on all aspects of investment policy development, the selection of suitable investments, education and tailoring of investment strategies to meet the unique objectives of clients. Most recently he was a Managing Director at Epoch Investment Partners. He joined Epoch at its inception and founded Epoch's west coast client service and business development efforts. Prior to joining Epoch he was a Managing Director with my CFO Investment Advisory Services where he advised affluent families on all aspects of their investments and had a significant influence on the development of the investment philosophy and implementation while chairing the Investment Policy Committee.

Prior to joining my CFO, Jon spent eight years as a Partner with Asset Strategy Consulting in Los Angeles. Asset Strategy tailored investment advisory services for a variety of prominent institutional and individual investors with approximately $200 billion of pension, endowment, foundation, insurance, and healthcare assets.

About Pillsbury Winthrop Shaw Pittman LLP Pillsbury is a full-service law firm with a focus on the energy and natural resources, financial services, real estate and construction, and technology sectors. Based in the world's major financial, technology and energy centers, Pillsbury counsels clients on global regulatory, litigation and corporate matters. We work in multidisciplinary teams that allow us to anticipate trends and bring a 360-degree perspective to complex business and legal issues-helping clients to take greater advantage of new opportunities and better mitigate risk. This collaborative work style helps produce the results our clients seek.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 10,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted more than 300 events globally, connected more than 250 senior women through Peer Advisory Groups and raised in excess of $24 million for philanthropic causes in the areas of women's and family health, education and mentoring.