



**100 women in
hedge funds®**

Evolution of a Hedge Fund Start-Up

May 30, 2013 at 5 PM
Toronto

What does it take to make the switch from sell-side trader to buy-side hedge fund entrepreneur? Three successful emerging fund managers will give an update on their businesses, as first recounted in October 2011. Join us as these entrepreneurs and portfolio managers share their views on the opportunities and challenges they faced in the past two years and also describe the landscape for the alternative investment industry in Canada.

Topics include:

- Building an institutional framework from scratch
- Investor sentiment and asset raising
- Challenges and rewards of the financial services entrepreneur

Participants

David Fry, Lawrence Park Capital Partners Ltd.

Matt Skipp, SW8

Jamie Wise, Periscope Capital

Lisa Petrelli, *Moderator*, UBS

Event Details

Date: May 30, 2013

Time: 4:30 PM Registration.

We will begin *promptly* at 5 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 before and after session.

Host: KPMG LLP

Location: KPMG offices

333 Bay Street, Bay Adelaide Centre, Suite 4600, **Toronto**, ON M5H 2S8, Canada - [Directions](#)

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [Toronto](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission to this event is free, but there is a 25 CAD charge if you register and do not attend (even if you cancel in advance). No-show proceeds will be donated to our 2013 beneficiary.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

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

Biographies

David Fry, CEO & Co-Founder, Lawrence Park Capital Partners Ltd.

David has been building or managing fixed income businesses for the better part of the last 20 years. Before co-founding Lawrence Park Capital Partners in 2011, David was Head of Global Markets for Deutsche Bank in Canada, from 2007-2010. In this role, David was responsible for all Global Markets risk and client businesses operating in Canada, and also served on the Board of Deutsche Bank Securities Ltd., and was Vice-Chair, Deutsche Bank Commodities Canada.

With half of his career spent in London and New York for TD Securities and ABN Amro, David's background in fixed income includes Managing Director roles in trading, syndicate, origination/structuring and sales. David has a BA (Administrative and Commercial Studies) from the University of Western Ontario, an MBA from McGill University and earned his CFA charter in 1996.

David lives with his wife and three young children in Toronto's leafy Lawrence Park neighbourhood.

Matt Skipp, President & Chief Investment Officer, SW8

Matt is the visionary behind SW8. Matt's passion for the stock market has its roots in Vancouver as a floor trader at the Vancouver Stock Exchange. What started as a summer job recording equity trades on a chalkboard, launched Matt on a career path to senior trading positions for RBC Capital Markets in Toronto, Vancouver and London, UK and Managing Director, Head of Trading at Blackmont Capital.

Matt brings more than 20 years of industry trading experience to SW8 gained from years of deploying large amounts of risk capital on both the long and short side. Matt is passionate about absolute returns and believes portfolios need to be actively managed to prosper in sideways or volatile markets. Matt has experience with large and small cap equities across all sectors and has supervised all trading across a number of business lines.

Matt believes in the power of a team and he has built SW8 around this core principal. His straight forward objective for his clients is to make money every month - he believes that this goal is his best risk manager and forces him to adjust his investment approach when required.

Jamie Wise, President and Chief Executive Officer, Periscope Capital

Jamie Wise is the President and Chief Executive Officer of Periscope Capital. Prior to launching the Firm in March 2009, Mr. Wise was a managing director at Moore Capital Advisors Canada (Moore), a multi-strategy Canadian-focused hedge fund with \$800MM in equity capital. At Moore, Mr. Wise had broad responsibilities including investment selection across the capital structure, leading internal investment teams and implementing portfolio hedging strategies. Prior to Moore, from 2001 to 2006, Mr. Wise was a Managing Director and Portfolio Manager at the Bank of Montreal (BMO) where he led an internal proprietary trading group specializing in North American capital structure arbitrage and volatility strategies including convertible bond trading. At BMO, Mr. Wise was appointed the youngest managing director in the firm's history. Prior to his role at BMO, Mr. Wise was a vice-president at Citigroup where he managed the Canadian equity derivatives trading business from 1998 to 2001. His team specialized in equity and index derivatives trading, volatility arbitrage and corporate derivatives structuring. Mr. Wise has an undergraduate business degree (hons.), graduating first in his class from the Ivey School of Business at the University of Western Ontario in 1998. Mr. Wise holds the CFA designation and has completed multiple regulatory examinations in both Canada and the United States.

Lisa Petrelli, Managing Director, UBS

Lisa is a Managing Director for UBS Securities. As Head of Equities, Lisa has over 15 years of experience with a number of Wall Street firms servicing the institutional investment community. While currently working at UBS, Lisa has worked at Goldman Sachs, Credit Suisse and Morgan Stanley building out the infrastructure of international trading to the Canadian institutional community. Today, Lisa remains actively involved in the day to day trading operations for many hedge fund and long only accounts, and she has been ranked as one of Brendon Woods' top traders.

About KPMG LLP (www.kpmg.com)

KPMG provides Audit, Tax, and Advisory services. We work closely with our clients, helping them to mitigate risks and grasp opportunities. KPMG LLP is the Canadian member firm of KPMG International. KPMG member firms have more than 152,000 professionals working in 156 countries around the world.

Our Asset Management teams comprise a network of almost 3,000 professionals working around the globe. We have the resources to advise our clients throughout the entire fund lifecycle - from creating value to realizing it. We work hard to help our clients understand complex industries as well as identify and respond to key business and performance issues as they arise.

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 close to \$28 million for philanthropic causes in the areas of women's and family health, education and mentoring.