



# Family Office Alpha



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01



## **Company Profile**

01

*company profile*



**The Next Generation of Family Office Capabilities:**  
**Our Management Team has seen economic and interest rate fluctuations, the tech bubble, terrorist attacks, the Great Financial Crisis, superstorms, zero interest rates, and the pandemic. We offer solutions that instill confidence.**



01

## *company profile*

### **Professionalized Family Office :**

**Spend more time investing and less time on administrative tasks, manual workarounds and jumping between disparate technology platforms.**



### **Our broad range of offerings include accounting**

**and bill pay, vendor selection, technology implementation, custom reporting, cybersecurity and digital identity protection.**

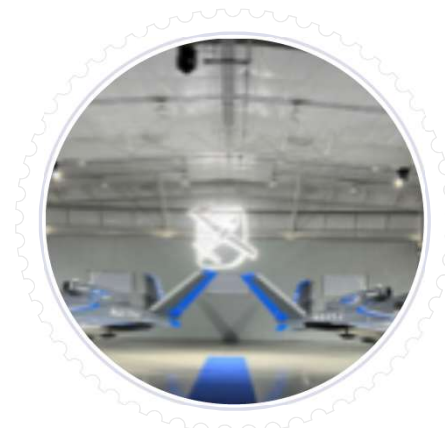


01

## *company profile*



**We operate at the highest level of security protocols and internal controls. We set up separate operating accounts to cover administrative and bill pay services; funds for each operating account are under the FDIC limit.**



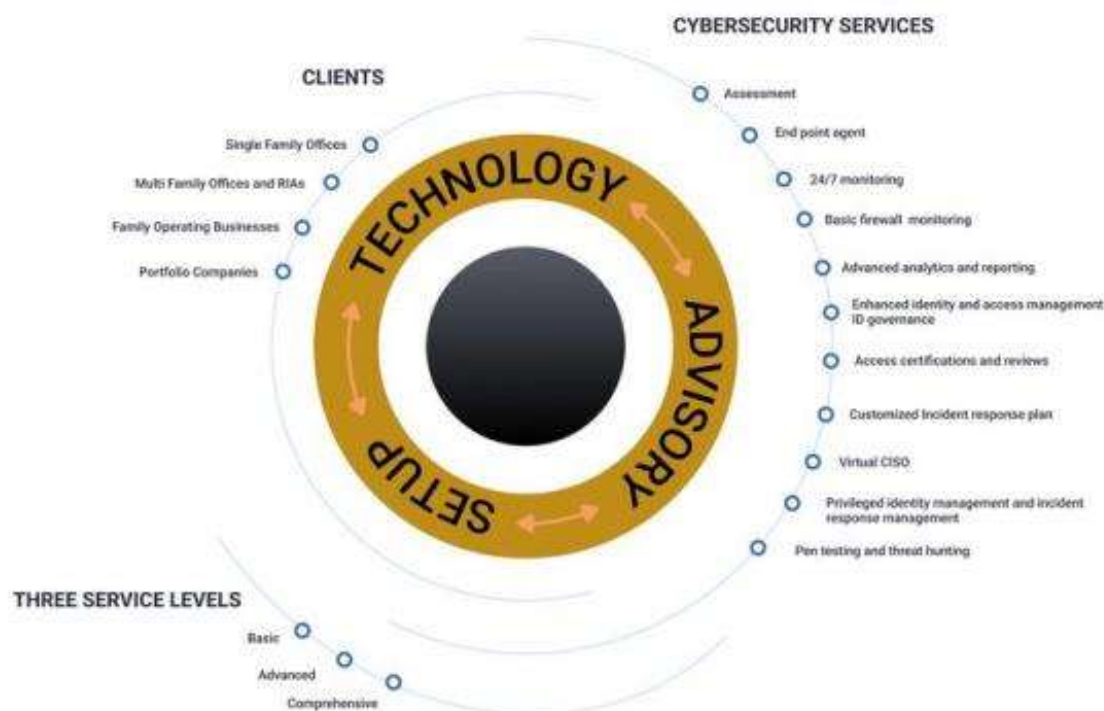
<https://web.archive.org/web/20240830114844/https://www.foalpha.com/>



02

## ► Service Introduction

## Family Office Alpha, Your Partner in Wealth through Cyber Defense.





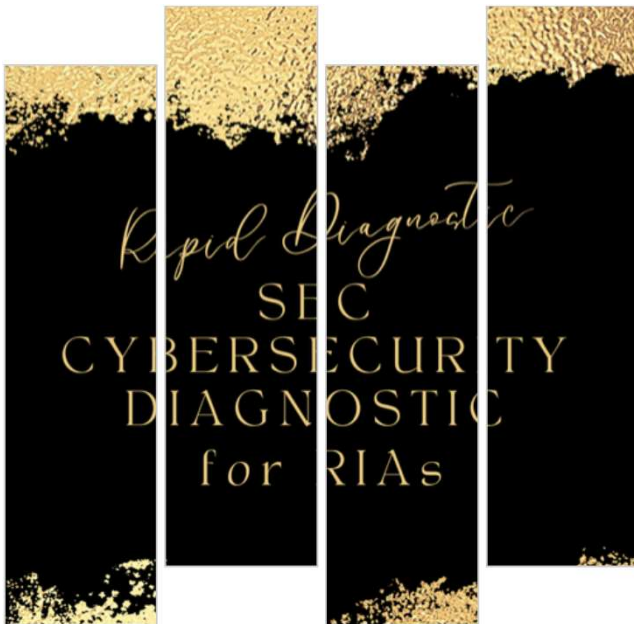
## Rapid Diagnostic

A great way to assess the current state of the organization and put together an action plan.

An initial meeting with Christopher Hetner, Former Senior Cybersecurity Advisor to the SEC Chair, Former US Treasury Senior Cyber Advisor & G-7 Cyber Expert and Cybersecurity Senior Executive Serving the 24,000 NACD Member Boardroom Community. Spend one hour to walk through the rapid, efficient diagnostic questionnaire to determine compliance with SEC cybersecurity regulations.

The second meeting with Christopher Hetner, Former Senior Cybersecurity Advisor to the SEC Chair. Discuss the results and lay out the next steps.

<https://www.foalpha.com/cybersecurity-services>



## Basic Cybersecurity Package

**A great way to strengthen the cybersecurity posture and put some basic protections into place.**

**Use abbreviated CIS Controls Framework, a model for codifying and promoting cybersecurity best practices by the Center for Internet Security, Inc. (CIS), to conduct the assessment. The CIS Controls Framework is the result of input from cybersecurity experts around the world.**

**Set up an end point agent that can monitor activity such as mouse movements, location data, and network context to help confirm a user's identity. If suspicious activity is detected, the agent can automatically alert the security team.**

**Implement 24/7 monitoring.**

**Implement basic firewall monitoring.**



**We work with family offices and RIAs to identify the type of cybersecurity package that is the best fit. Services include:**

- **End point agent;**
- **24/7 monitoring ;**
- **Basic firewall monitoring;**
- **Advance analytics and reporting ;**
- **Enhanced identity and access management ID and governance ;**
- **Access certifications and reviews;**
- **Incident response plan (customized):**
- **vCISO.**

## Advanced Cybersecurity Package



## Comprehensive Cybersecurity Package

We work with family offices and RISs to identify the type of cybersecurity package that is the best fit. Our most comprehensive package include:

- ◆ End point agent
- ◆ 24/7 monitoring
- ◆ Basic firewall monitoring
- ◆ Advanced analytics and reporting
- ◆ Enhanced identity and access management ID and governance
- ◆ Access certifications and reviews
- ◆ Incident response plan (customized)
- ◆ vCISO
- ◆ Privileged identity management
- ◆ Incident response management
- ◆ Pen Testing
- ◆ Threat hunting

<https://www.foalpha.com/cybersecurity-services>





03

## ► Personage Introduction



On the ground



**Who we are?**

**We are an exceptional team with decades of finance, accounting and technology experience. We understand family offices, our founders have 1. managed their own family office and 2. worked for one of the top 5 family offices in the world by assets under management and have managed large single and multiple family offices as well as implementing banking solutions and end-to-end technology solutions.**

**As a family office, the need to simplify and manage time consuming tasks including bill pay, general accounting is essential. This frees up and allows family offices to focus on investments and bigger picture PnL by business unit or generation family wealth.**

**We are your back office and provide technology for family offices to check processes, protocols and see reports detailing cash flow, income and expenses as well as customized reports for the general payment of bills.**



03

*personage introduction*

**Meet the Team**



**Julia Valentine CEO**



**Tracy McWilliams  
Co-Founder**



**Michael Laido CFO**



**Phoebe Van Tran  
Managing Partner**



03

*personage introduction*

**Meet the Team**



**Grace Cassab  
Advisor**



**Mike Blogna  
Advisor**



**Caitlin Panasci  
Advisor**



**Jenny Trang  
Nguyen Advisor**

03

*personage introduction*

**Meet the Team**



**Brinkley Skye Advisor**



**Holly Nelson, Strategic  
Director**



**Eva van Basten Vice President**

<https://web.archive.org/web/20230722114410/https://www.foalpha.com/about>

**JULIA VALENTINE, AlphaMille Managing Partner**

**Julia Valentine is a solution-focused FinTech Advisor to boards and management teams. Throughout her executive career, Ms. Valentine has held leadership positions at JPMorgan Chase, D. E. Shaw and Mousse Partners, one of the largest family offices in the world.**

**As a Vice President at JPMorgan Chase, Ms. Valentine led some of the bank's key technology projects, including the implementation of the global Equity Derivative portfolio into the Value-at-Risk system, the implementation of the Program Trading solution, and saving \$4.5M annually on risk infrastructure through automation process re-engineering.**

**JULIA VALENTINE, AlphaMille Managing Partner**

**Ms. Valentine has extensive new product development experience in the areas of retail, private and investment banking. She served as the Vice President of New Business Initiatives at JPMorgan Chase. The products she launched generated \$70M annually. Ms. Valentine also served as the Chief Technology and Operations Officer at the \$110Bn WI pension fund.**

**With extensive experience in effectively managing global teams in developed and emerging markets, Ms. Valentine is a value-added advisor for FinTech firms requiring expert assistance with business strategy, new product offerings, strategic partnerships, and investments in technology and operations that help banks modernize and serve the digital natives.**

**JULIA VALENTINE, AlphaMille Managing Partner**

**Her broad areas of practice include Technology & Operations assessment, technical architecture, system selection and implementation, vendor outsourcing, building hybrid technology teams, cloud strategy, cybersecurity, digital transformation, change management, data management, data science, ML/AI, RPA, blockchain, process optimization and governance.**

**Ms. Valentine holds an MBA from Columbia University and a Bachelor of Science in Economics and Finance from the New York University Stern School of Business, magna cum laude.**

<https://www.alphamille.com/julia-valentine-bio>

# The title goes here



## ■ Your title here

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## ■ Your title here

Ms. Valentine holds an MBA from Columbia University and a Bachelor of Science in Economics and Finance from the New York University Stern School of Business, magna cum laude.

**Tracy McWilliams | CEO | Inspire Global Ventures | General Partner | Inspire Global Ventures Fund**

**Tracy McWilliams is a co-founder of the Digital Evolution Institute. Tracy McWilliams is an investor and Board member to teams, technologies and firms that disrupt their industries. She is the founder, investor and CEO of Inspire Global Ventures (IGV) and General Partner of the IGV Transformative Technology Fund, investor and founder of JaspY, a disruptive infrastructure and alternatives technology platform. inspire breakthrough problem-solving.**



<https://www.digitalevolution.institute/team>



04



**All Activities**



04

## *all activities*

<https://www.foalpha.com/videos>

01

**Family Office Alpha for Athletes •**

**9/30/24**

**Family Office Alpha and 73 Holdings Partnership looking forward to an exciting 2025.**

**About Family Office Alpha and 73 Holdings.**

<https://youtu.be/k8T3QGuNqbE>

02

**Family Office Alpha for Athletes •**

**10/20/24**

**Family Office List MasterClass: Athletes & Family Offices**

**Join us for an exclusive MasterClass hosted by Danielle Patterson, CEO of Family Office List, featuring Julia Valentine, CEO of Family Office Alpha, and Garrick Jones, Founder of 73 Holdings LLC and Managing General Partner of The Alliance.**

<https://youtu.be/vpgHmNJjD5o>

03

**If you think that cybersecurity is a technology problem, you're wrong. The return on your investment in cybersecurity is about protecting your business from grinding to a halt and informing your stakeholders of the value-added benefits of being a part of a well-run organization.**

<https://youtu.be/ke5w1EeRHlk>

04

**Cybersecurity • 9/30/24**

**Family Office List MasterClass: Family Office Technology & Cybersecurity**

**Join us for an exclusive MasterClass hosted by Danielle Patterson, CEO of Family Office List, featuring special guest Julia Valentine, CEO of Family Office Alpha.**

<https://youtu.be/1Q5JWi1gK3A>

## Family Office Alpha Governance and Communication Series



**“Colley Intelligence, a full-service international corporate investigation, intelligence, and advisory firm that’s been in business since 1987. Colley advises corporate boards, C-Suite Executives, and ultra-high-net-worth individuals on real and perceived threats in disputes and litigation affecting their legal and financial interests or reputation. In sum, we collect facts, analyze data, trace assets, and mitigate risks for businesses and key decision-makers.**

**Our team is comprised of experts from “three-letter” agencies, legal and consulting firms, and Capitol Hill.**

**Our clients include corporations and people targeted by opponents or governments by virtue of their success, influence, or wealth. Our clients include everyone from Nike and the City of New York, AmLaw Top 100 law firms to closely-held, highly successful businesses and investors.**

**We investigate corporate and financial crimes, sensitive commercial legal disputes, and a host of other issues around transactions, reputation, and even cybercrimes and hacking. ”**



FAMILY  
OFFICE  
ALPHA



Governance  
and  
Communication

Julia Valentine

04

*all activities*

## Family Office Alpha Governance and Communication Series



**- Lois Colley**  
**President and Founder of Colley Intelligence**

[https://www.foalpha.com/intelligence?utm\\_source=chatgpt.com](https://www.foalpha.com/intelligence?utm_source=chatgpt.com)



**“All personality styles are equally valuable. Whether it is to understand your own DiSC personality style, or how to relate to other DiSC personality styles and effectively curb destructive behaviors, we help you improve your self-awareness around conflict behaviors. This helps the Next Generation tremendously, both in figuring out their own path, as well as facilitating wealth transfer through better communication.”**

**- Alex Elman Foley**





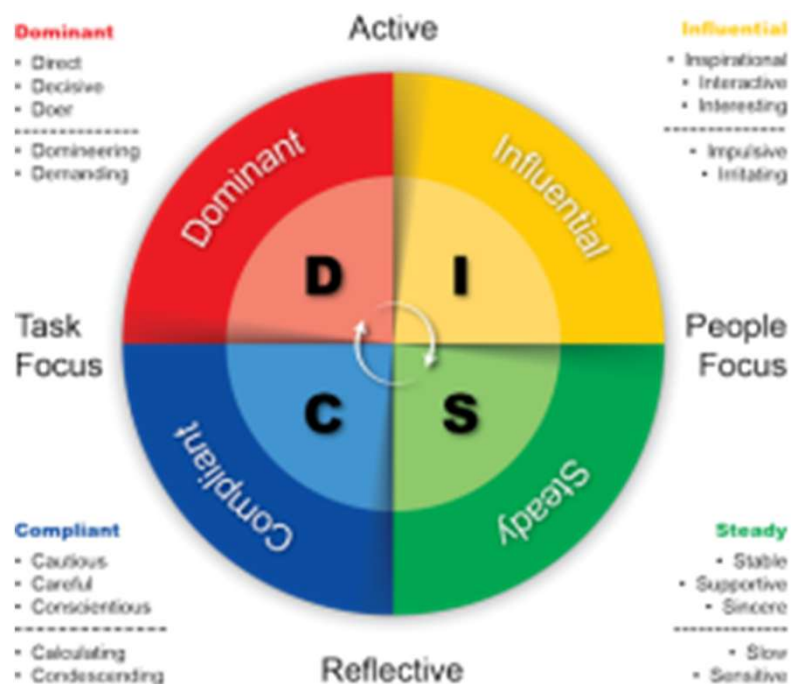
FAMILY  
OFFICE  
ALPHA



**Governance**  
and  
**Communication**

**Julia Valentine**

# Family Office Alpha Governance and Communication Series



<https://www.foalpha.com/communication>

**project**

**Athletes as Investors**  
**Earning \$\$\$\$\$\$, Holding on**  
**to Wealth**  
**Date & Time**  
**September \_\_, 11-12 ET**  
**Webinar Length**  
**60 minutes**  
**Awareness, strategy &**  
**action plan**

**content**

If you think that achievement is difficult, think again. Achievement requires an unwavering focus. Creating and holding on to wealth, on the other hand, requires its own mindset, awareness, focus, strategy and learning enough to provide effective oversight over the experts you hire.

In this webinar you'll learn about the first three steps to take towards creating generational wealth, and the biggest challenge to overcome in order to hold on to wealth. Hear from our CEO, Julia Valentine and Garrick Jones, CEO of 73 Holdings, in this power hour webinar.



04

*all activities*



## Your Curated Agenda

## **Why it is difficult for professional athletes to focus on wealth creation at the time they are intensely focused on their career**

## The psychology of money: are family patterns real

## Goal setting: How to know where you stand, and how to create a roadmap to success

## Who should set up a family office and why


## The first three steps to take

## Why athletes make great investors What athletes wish they had known at the beginning of their professional careersYour Webinar Speakers




**Julia Valentine - CEO coming out of a top-ten hedge fund/VC fund D. E. Shaw, a top-ten family office Mousse Partners, and a top-ten Global Equities and Equity Derivatives group within JPMorgan Investment Bank, with a passion for bringing the most successful blueprints to the Family Office space.**

**Garrick Jones - Mr. Jones is the founder of 73 Holdings LLC and the Managing General Partner of The Alliance. Garrick a multifaceted talent who seamlessly transitioned from a remarkable NFL and CFL career to a thriving role as the CEO of 73 Holdings LLC, Garrick Jones stands tall at 6'5" and hails from North Little Rock, Arkansas.**



**His journey from the gridiron to the boardroom is a testament to his unwavering dedication and unmatched prowess. On the field, Garrick Jones made a memorable mark as an offensive lineman, guarding quarterbacks for renowned teams such as the Houston Texans, Kansas City Chiefs, Atlanta Falcons, and Jacksonville Jaguars in the NFL. He also proudly represented the Winnipeg Blue Bombers, Edmonton Eskimos, and Calgary Stampeders in the CFL. His relentless work ethic and commitment to excellence propelled him to the pinnacle of professional football.**

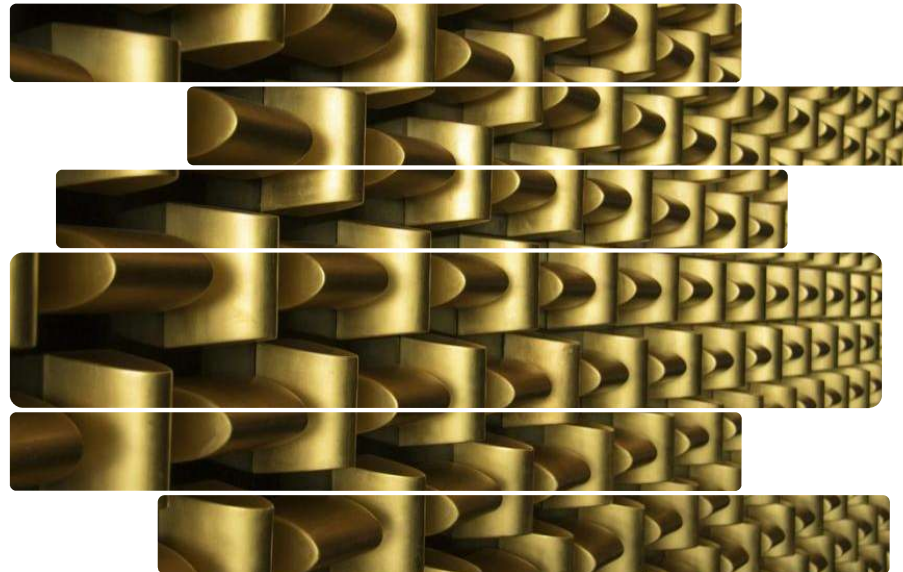


Beyond his gridiron feats, Jones has an equally impressive professional track record. He served as the Vice President of the NFL Players Association Houston Chapter, where he advocated for the rights and well-being of fellow athletes. Today, he serves as the visionary President of the Huddle Up Foundation, a testament to his commitment to philanthropy and community development. His tireless efforts in this domain earned him the prestigious distinction of "Garrick Jones Day" on October 25, 2005, recognized by the city of Houston for his outstanding contributions to the community. Currently, as the CEO of 73 Holdings LLC, Garrick Jones spearheads a conglomerate that includes groundbreaking entities like The FanCentric DAO and the esteemed private equity fund, 73 SARE, in which he is a general partner. The FanCentric DAO revolutionizes fan engagement in the digital age, while 73 SARE drives innovation and investment in promising ventures. Garrick's ability to identify and nurture opportunities has solidified his reputation as a visionary leader in the business world.



## Discover Your Next Step

**A limited number of free Family Office consultations will be offered to attendees to help identify their generational wealth goals.**



<https://www.foalpha.com/athlete-as-an-investor-webinar>

Family Office Alpha and 73 Holdings  
Partnership looking forward to an exciting  
2025. <https://youtu.be/k8T3QGuNqbE>

**Family Office Alpha for Athletes • 9/30/24**  
**Family Office Alpha and 73 Holdings**  
**Partnership looking forward to an exciting 2025.**

<https://www.foalpha.com/videos/v/hosted-with-custom-z9ehj-dwh9x-mrgek>

## Family Office List MasterClass: Athletes & Family Offices

**Family Office Alpha for Athletes • 10/20/24**

**Family Office List MasterClass: Athletes & Family Offices.**

**What You'll Learn:** Wealth management challenges for professional athletes .The psychology of money and family patterns Goal setting and creating a financial roadmap Steps for establishing a family office .The appeal of team ownership for athletes Importance of cybersecurity in protecting wealth

**About Our Speakers:** Julia Valentine brings 20+ years of expertise from top firms like JPMorgan and D.E. Shaw. She has served on the board of Apple Bank and was on a management team of a public pension fund with \$110 billion AUM. Garrick Jones is a former NFL and CFL athlete who transitioned into a successful business leader. As CEO of 73 Holdings LLC, he leads groundbreaking ventures like The FanCentric DAO and private equity fund 73 SARE.

**Don't miss this opportunity to learn how athletes are making strategic investment decisions to create lasting legacies.**



<https://youtu.be/vpgHmNJd5o>

<https://www.foalpha.com/videos/v/mrxr5mry8b7tln5pbb6g85hk9resym>

## Reputational & Financial Impact of Cyber Events

**Cybersecurity • 10/18/24**

**Reputational & Financial Impact of Cyber Events Webinar**

**In this webinar you'll learn how to measure the return on your investment in cybersecurity, and how to get the most out of your cybersecurity program for years to come. Hear from our CEO, Julia Valentine and our experts, Anthony Carter and Mike Wilkes, in this power hour webinar.**



<https://youtu.be/ke5w1EeRHlk>

<https://www.foalpha.com/videos/v/it-is-nhsde-3akh4-bm5td>





## Family Office List MasterClass: Family Office Technology & Cybersecurity

**Cybersecurity • 9/30/24**

**Family Office List MasterClass: Family Office Technology & Cybersecurity**

**Julia Valentine brings over 20 years of experience at top-tier firms, including JPMorgan, D.E. Shaw, and Mousse Partners, a prominent family office. She has also served as COO and CTO of a public pension fund with \$110 billion in assets under management and is currently a board member of Apple Bank, New York's largest state-chartered savings bank with \$17 billion in assets and \$15 billion in deposits. In this session, Danielle and Julia will explore the critical topic of Family Office Technology & Cybersecurity.**

**According to a recent JPMorgan Global Family Office report, 25% of family offices have experienced cybersecurity breaches or fraud, yet only one in five has adequate cybersecurity measures in place. This MasterClass will cover why cybersecurity should be a top priority, how to assess and enhance your family office's defenses, and the essential steps to protect your reputation and assets.**



<https://youtu.be/1Q5JWi1gK3A>

<https://www.foalpha.com/videos/v/daily-calm-yyhd4-sgp3h>



## Family Office List MasterClass: Family Office Technology & Cybersecurity

### Key Topics Covered:

- Why cybersecurity should be top of mind for family offices.
- How to determine your starting point and create a roadmap to success.
- What to expect from an in-house team and how to manage a reasonable budget.
- Evaluating and improving your technology infrastructure.
- How to assess technology providers and the quality of your governance and internal controls.
- Don't miss this opportunity to learn from industry leaders and ensure your family office is prepared to meet the evolving challenges of cybersecurity and technology infrastructure.



## Family Office Alpha in Partnership with 73 Holdings Presents



### **The Legacy Circle: Elevating Financial Fitness to World-Class Excellence**

**We bring together professional athletes from all backgrounds and prepare them for life both during and after their sports careers. We're creating a powerful intersection between the world of finance and professional sports. Our goal is not just to build lasting relationships, but to equip athletes with the tools to establish family offices, become business-ready, and pursue ownership in professional sports teams. By fostering financial freedom and positioning athletes to build generational wealth for their families and future generations, we aim to empower them to take control of their legacy. Through our partnership with Family Office Alpha and 73 Holdings, we are leveraging our networks to maximize value, share opportunities, and pave the path to ownership and lasting success.**

<https://www.foalpha.com/family-office-alpha-athlete-academy-signup>



## The Ultimate Family Office Technology Provider Guide

### The Challenge

Over the next 25 years, an unparalleled transfer of wealth estimated at \$72 trillion will take place in front of our eyes. To meet current and ever-evolving, operational, investment and security mandates, family offices are in a race against time to strengthen, upgrade and enhance their technology infrastructure.

### A Research Based Guide

Family Offices across the world are working to create the ideal tech stack future proofing their ability to thrive in the next generation. Family Office Alpha has sponsored a Technology Provider Guide by AlphaMille. It includes:

- Definitions of the 13 key categories of family office technology.
- A comprehensive list of solutions for each category/need.
- A definition of solutions within each category for review.



<https://www.foalpha.com/technologyguide>



05

► **Contact Address**

05

*contact address*



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## Contact Us

We are happy to hear from you.

**info@foalpha.com**

**27 West 60th Street**

**New York, New York 10023**

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<https://www.foalpha.com/contact>

# THANKS

