

FT PARTNERS FINTECH INDUSTRY RESEARCH

November 30, 2020



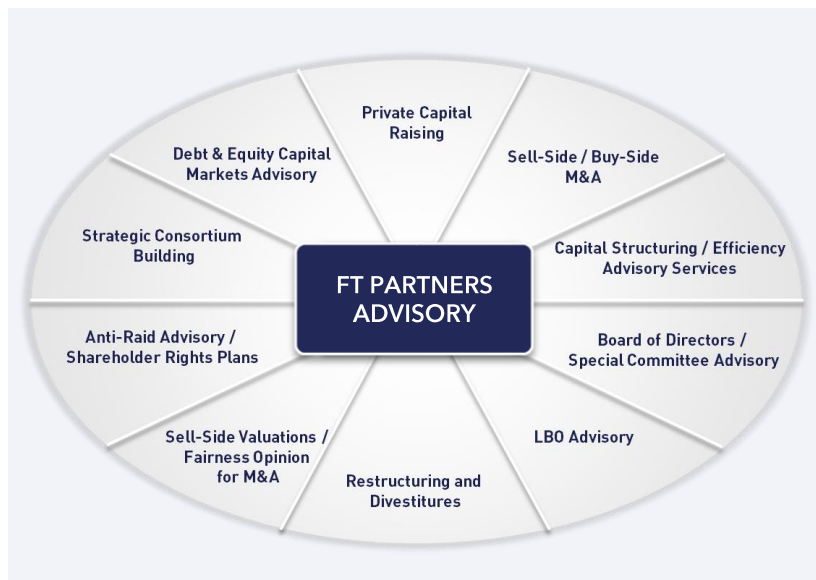
Addepar Raises \$117 million in Series E Financing Led by WestCap Group



Overview of FT Partners

- Financial Technology Partners ("FT Partners") was founded in 2001 and is the only investment banking firm focused exclusively on FinTech
- FT Partners regularly publishes research highlighting the most important transactions, trends and insights impacting the global Financial Technology landscape. Our unique insight into FinTech is a direct result of executing hundreds of transactions in the sector combined with over 19 years of exclusive focus on Financial Technology

FT Partners' Advisory Capabilities



FT Partners' FinTech Industry Research



The Information

Named Silicon Valley's #1 FinTech Banker (2016) and ranked #2 Overall by The Information



Ranked #1 Most Influential Person in all of FinTech in Institutional Investors "FinTech Finance 40"



THE M&A ADVISOR

Numerous Awards for Transaction Excellence including "Deal of the Decade"

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Addepar Raises \$117 million in Series E Financing

FT PARTNERS RESEARCH



Transaction Summary

Transaction Summary

- **On November 18, 2020, Addepar, a technology platform for wealth management, announced it has raised \$117 million in Series E financing led by WestCap Group**
 - Other investors include Sway Ventures and 8VC, the venture fund founded by the founder of Addepar, Joe Lonsdale
 - This round brings Addepar's total funding to date to approximately \$325 million
- **The Company plans to use the funding to support expanding its data aggregation, analysis and reporting platform for investors and advisors**
 - Addepar has continued to grow its client base, revenues, and assets, and now has more than \$2 trillion in client assets on the platform, adding an average of \$10 billion per week
 - The Company serves over 500 family offices, RIAs, and banks
- **Addepar represents one of several strategic FinTech investments made by WestCap Group over its 20-year history**
 - WestCap's FinTech strategy is focused on the intersection of technology and private capital markets, a segment that has historically been underserved by technology
- **Addepar has continued to invest in innovation, delivering new products that strengthen the results of wealth managers**
 - In May, the Company launched Marketplace, an application offered through Acervus Securities that lets advisors buy and sell alternative funds, private company securities, and invest in cash deposit programs in one place

Transaction Commentary

"Addepar is an intuitive and critical platform for effectively tracking and managing a wide range of financial assets. The Addepar team has brought the best of Silicon Valley innovation and Wall Street risk management capabilities together and is fundamentally transforming the financial industry by giving investors more visibility and control over their investments. Addepar will see continued high growth as investment management firms need even greater speed, clarity, and insight to stay competitive and manage risk. The company's performance during this unprecedented time of volatility shows its ability to deliver unmatched value across market cycles."



Laurence A. Tosi
Founder & Managing Partner



"There are more than \$120 trillion in investable assets globally, and the striking majority of these investments are managed in spreadsheets, using decades-old processes. Addepar is making meaningful technology- and data-driven innovations to maximize the impact of this capital, and bringing our solutions to a wider audience. The growth we've experienced this year is a direct result of putting our clients at the center of our priorities. We're continuously pursuing novel ways to expand the value we bring to each of these relationships. We are winning in our core markets and see a substantial opportunity to grow, and we're ideally positioned to continue expanding our business in new dimensions as our team drives towards our bold vision with our client, partner and investor community."



Eric Poirier
CEO



Addepar Raises \$117 million in Series E Financing



Addepar Overview

Company Overview



CEO: Eric Poirier

Headquarters: Mountain View, CA

Founded: 2009

- **Addepar is building ambitious technology to power the global financial system**
 - Addepar's portfolio management platform is secure, cloud-based, automated, fast and scalable
 - The Company has amassed a broad network of custodians, fund administrators, financial market data providers and integration partners
- **Currently the Company works with over 500 family offices, wealth advisors, financial institutions, banks, endowments and funds / fund administrators**
 - Addepar has more than \$2 trillion in assets on its platform

Selected Financing History

Date	Type	Amount	Selected Investor(s)
11/18/20	Series E	\$117	WestCap Group; 8VC; Sway Ventures
06/08/17	Series D	140	CreditEase; Tower Equity; Haitao Capital; Valor Equity Partners; 8VC; Undisclosed Investor(s)
05/13/14	Series C	50	Formation 8; Valor Equity Partners; Panorama Point Partners; Undisclosed Investor(s)
06/15/11	Series B	16	White Sand Capital; Thrive Capital; Sway Ventures; Streamlined Ventures; Signatures Capital; Prometheus Group

Products & Services Overview

The Addepar Platform & Services

Addepar Platform

- ✓ Comprehensive data aggregation and reconciliation
- ✓ Powerful analytics
- ✓ Customizable reporting and interactive client portal
- ✓ Extensible technology platform with API and suite of integrations

Services Include

- ✓ Deployment & data onboarding
- ✓ Ongoing support
- ✓ Client advocacy
- ✓ Training
- ✓ Professional services

Solutions for:



Family Offices



Wealth Advisors



Private Banks

Benefits

- **Ability to tailor client services & make impact through customized reporting**
- **Streamline operations & drive cross-team efficiencies**
- **Make informed, data-driven investment decisions**
- **Promote business growth through modern technology**

FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Selected FT Partners Research – *Click to View*

July 30, 2020

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT PARTNERS is Pleased to Announce
Its Role as Exclusive Financial
Advisor to

CIRCLE

on its financing from

DIGITAL CURRENCY GROUP

for a total amount of
\$25,000,000

FINANCIAL TECHNOLOGY PARTNERS

The Only Investment Bank Focused Exclusively on FinTech

San Francisco • New York • London

Circle's \$25 million Financing

January 22, 2020

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT PARTNERS is Pleased to
Announce its Role as Exclusive
Strategic and Financial Advisor to

clearpool

on its sale to

BMO Bank of Montreal

FINANCIAL TECHNOLOGY PARTNERS

The Only Investment Bank Focused Exclusively on FinTech

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Clearpool's Sale to BMO

August 12, 2020

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT PARTNERS is Pleased to Announce
its Role as Exclusive Strategic and
Financial Advisor to

TRUMID

on its financing led by

DRAGONEER

with participation from

TPG

& funds and accounts managed by
BLACKROCK T.RowePrice

for a total amount of
\$200,000,000

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Trumid's \$200 million Financing

May 12, 2020

FT PARTNERS
TRANSACTION ANNOUNCEMENT

FT PARTNERS is Pleased to Announce
its Exclusive Role as Strategic and
Financial Advisor to

Forge

on its merger with

SHARESPOST

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Forge's Merger with SharesPost

FT PARTNERS FINTECH INDUSTRY RESEARCH

July 22, 2020

scalable CAPITAL

Scalable Capital Raises €50 million
in Series D Financing

BlackRock **TEV** **HV**

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Scalable Capital Raises €50 million in Series D Financing

FT PARTNERS FINTECH INDUSTRY RESEARCH

October 1, 2020

robinhood

Robinhood Raises \$660 million in
Series G Financing

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Robinhood Raises \$660 million in Series G Financing

FT PARTNERS FINTECH INDUSTRY RESEARCH

July 6, 2020

EMPOWER RETIREMENT

Empower Retirement Acquires Personal
Capital for up to \$1 billion

personal CAPITAL

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Empower Retirement Acquires Personal Capital for up to \$1 billion

FT PARTNERS FINTECH INDUSTRY RESEARCH

June 19, 2020

PAGAYA

Pagaya Raises \$102 million in
Series D Financing Led by GIC

GIC

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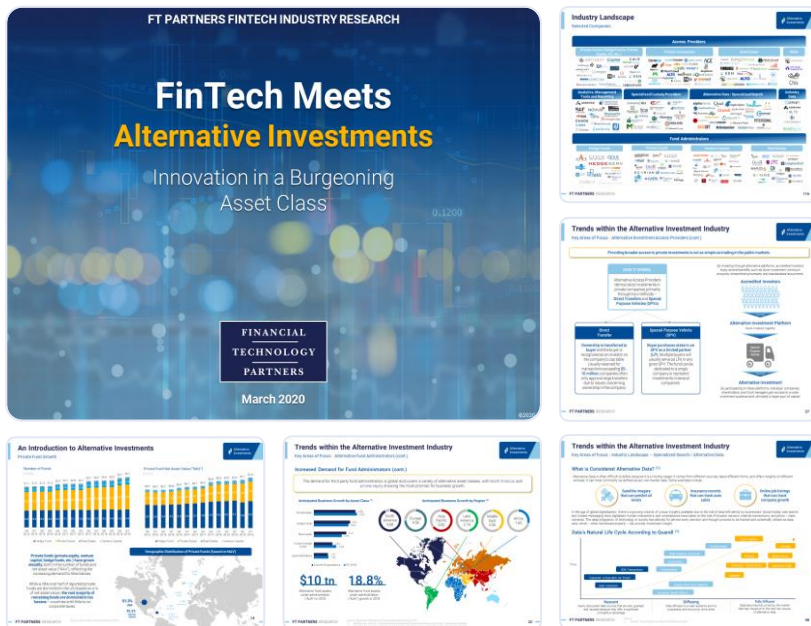
San Francisco • New York • London

Pagaya Raises \$102 million in Series D Financing

[VIEW MORE FT PARTNERS RESEARCH](#)

FT Partners Research – FinTech Meets Alternative Investments

FinTech Meets Alternative Investments Innovation in a Burgeoning Asset Class



Click pictures to view report

Demand for alternative assets remains strong as investors and plan sponsors seek asset diversification, higher yields, and uncorrelated returns. As a result, alternatives are a clear bright spot in the asset management industry. As demand grows for alternative assets, a new FinTech ecosystem is developing to help investors, investment managers, and service providers to access new asset classes and manage their investments and operations with new data, software, and platforms.

Highlights of the report include:

- An overview of trends driving the developing FinTech ecosystem around the Alternative Investment Management industry
- A detailed landscape of FinTech companies operating in the Alternatives space
- Proprietary list of financing and M&A transactions in the space
- Interviews with the CEOs of 11 companies driving innovation in Alternatives
- Detailed profiles of 41 FinTech companies operating in the industry

FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Selected FT Partners Capital Markets / WealthTech Transactions

M&A Transactions

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as strategic and financial advisor to



on its merger to



SHARESPOT

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Financial Technology Partners LP
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is pleased to announce its exclusive role as advisor to

BLACKROCK

in its 100% acquisition of



FutureAdvisor

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is pleased to announce its exclusive role as strategic and financial advisor to



on its sale to



BMO Bank of Montreal

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is pleased to announce its exclusive role as strategic and financial advisor to

TRUST COMPANY OF AMERICA

in its sale to



E*TRADE

for total consideration of

\$ 275,000,000

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is pleased to announce its exclusive role as strategic and financial advisor to



in its Series B financing led by



Operator

for total consideration of

\$ 70,000,000

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Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its role as exclusive strategic and financial advisor to

AlphaSense

on its Series B Financing from



INNOVATION ENDEAVORS

for total consideration of

\$50,000,000

FINANCIAL TECHNOLOGY PARTNERS

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Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its role as exclusive strategic and financial advisor to



ADDEPAR

in its Series D financing co-led by



VALOR 8VC

for total consideration of

\$ 140,000,000

FINANCIAL TECHNOLOGY PARTNERS

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Focused Exclusively on Financial Technology

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as strategic and financial advisor to



TRUMID

on its financing led by



TPG

for a total amount of

\$200,000,000

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Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as sole strategic and financial advisor to



PENSCO TRUST COMPANY

in its sale to



OpusBank

for total consideration of

\$ 104,000,000

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ATD

in its sale to



Citi

for cash and stock consideration of approximately

\$ 680,000,000

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INSTINET

in its sale of its stake in



CHIX EUROPE

for total consideration of approximately

\$ 305,000,000

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CVC Capital Partners

in its acquisition of



OANDA

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Financial Technology Partners LP
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is pleased to announce its role as exclusive strategic and financial advisor to



riskalyze

in its growth equity investment led by



FTV CAPITAL

for total consideration of

\$ 20,000,000

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Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as Capital Markets & IPO Advisor to



INVESTNET

in its

\$69,000,000

Initial Public Offering

valuing the equity at approximately


\$ 300,000,000

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Liquidnet

in its financing for approximately

\$ 250,000,000

valued at approximately

\$ 1,800,000,000

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FTP Securities LLC

is pleased to announce its exclusive role as strategic and financial advisor to



moneyfarm

on its Series C Financing led by



Posteitaliane

with participation from



Allianz

for a total consideration of

£36,000,000

FINANCIAL TECHNOLOGY PARTNERS

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is pleased to announce its exclusive role as sole strategic and financial advisor to



ITG INVESTMENT TECHNOLOGY GROUP

in the acquisition of



macgregor

for cash consideration of approximately

\$ 230,000,000

FINANCIAL TECHNOLOGY PARTNERS

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FTP Securities LLC

is pleased to announce its exclusive role as sole strategic and financial advisor to



LATENTZERO

in its sale to

Fidessa
(Royalblue Group Plc)

for aggregate consideration of up to approximately

\$ 125,000,000

FINANCIAL TECHNOLOGY PARTNERS

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is pleased to announce its exclusive role as sole strategic and financial advisor to



THE MARKETS.COM

in its sale to

Capital IQ
A Division of Standard & Poor's

for total consideration of approximately

\$ 300,000,000

FINANCIAL TECHNOLOGY PARTNERS

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WOMBAT FINANCIAL SOFTWARE

in its sale to



NYSE Euronext

for total consideration of approximately

\$ 225,000,000

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TradingScreen

in its minority recapitalization for

\$ 110,000,000

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nutmeg

in its Series E Financing from



CONVOY

for total consideration of

£45,000,000

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AXIAL

in its financing led by



Edison PARTNERS

for total consideration of approximately

\$ 14,000,000

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BACKSTOP SOLUTIONS

in its minority financing from

Roger Kaffke, Tao Huang, David Bradley



VISTARA CAPITAL PARTNERS

for total consideration of

\$ 20,000,000

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FT Partners has advised on some of the most prominent and groundbreaking transactions in the Securities / Capital Markets / Wealth Technology sectors

FT Partners Advises Addepar on its Series D Financing

Overview of Transaction

- On June 8, 2017, Addepar announced it has raised \$140 million in Series D financing co-led by Harald McPike, the founder of QuantRes, along with Valor Equity Partners and 8VC
- Headquartered in Mountain View, CA, Addepar is a leading provider of portfolio management and reporting software and services that seeks to become the infrastructure that will connect all aspects of global finance
- Harald McPike is the founder of QuantRes, a quantitative trading firm, and a global private investor with a focus on the financial and technology sectors
- Valor Equity Partners is an operational growth investment firm that does both minority and majority investments in high growth companies at various stages of development
- 8VC is a venture capital firm that makes seed to later stage investments with a focus on the technology industry

Significance of Transaction

- The financing capitalizes on Addepar's unprecedented growth — from \$300 billion to over \$650 billion assets on platform in less than 18 months — as top wealth managers embraced Addepar's category-defining client reporting software
- With the new capital, Addepar will continue investing significantly in R&D, expanding its product, platform and tech-enabled services to unlock more value for its clients while also serving a wider range of wealth and asset management firms

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Addepar
- Transaction demonstrates FT Partners' continued leadership position as the "advisor of choice" to the highest quality FinTech companies as well as its deep domain expertise and experience in the WealthTech space

Financial Technology Partners LP FTP Securities LLC

*is pleased to announce its role as
exclusive strategic and financial advisor to*



in its Series D financing co-led by



Harald McPike

for total consideration of

\$ 140,000,000



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FT Partners Advises Trumid on its \$200 million Growth Capital Investment

Overview of Transaction

- On August 12, 2020, Trumid announced the completion of a \$200 million growth capital investment at a valuation of over \$1 billion led by Dragoneer Investment Group, with participation from new investors including TPG Capital, and funds and accounts managed by BlackRock and T. Rowe Price Associates, Inc
- Trumid is a US corporate bond trading platform that brings trading efficiency and connectivity to credit professionals
- The Company has differentiated itself by collaborating with market participants to create innovative trading solutions
 - Since its launch one year ago, Trumid's Attributed Trading (AT) protocol has established a dominant position in dealer streaming and bilateral dealer-client trading
- Trumid has experienced extraordinary growth in activity across its trading platform, with volumes up nearly 500% in 2020 from its network that has grown to over 500 institutions worldwide

Significance of Transaction

- The growth capital from this financing will support broadening of Trumid's trading protocols and expansion into adjacent products and geographies

FT Partners' Role

- FT Partners served as exclusive financial and strategic advisor to Trumid
- This transaction highlights FT Partners' deep domain expertise within Capital Markets Tech, as well as its successful track record generating highly favorable outcomes for high-growth FinTech companies globally

Financial Technology Partners LP FTP Securities LLC

*is pleased to announce its role as
exclusive strategic and financial advisor to*

TRUMID

on its financing led by



with participation from



& funds and accounts managed by

BLACKROCK **T.RowePrice**

for a total amount of

\$200,000,000



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FT Partners Advises Circle on its \$25 million Financing

Overview of Transaction

- On July 30, 2020, Circle announced it has raised \$25 million in financing from Digital Currency Group as part of a strategic partnership with Genesis aimed at enhancing Circle's new suite of products for businesses and developers with USDC-based yield and lending services
 - Digital Currency Group is the parent company of Genesis
- Circle is a global FinTech firm that enables businesses of all sizes to harness the power of digital currencies and blockchains for payments, commerce and financial applications
 - Circle is the pioneer of USDC, the fastest growing, regulated digital currency backed by the US Dollar
- In Q2 2020, Circle launched its new suite of Platform Services, providing businesses with a comprehensive suite of products and APIs for integrating and implementing stablecoins for payments, global commerce, and financial applications

Significance of Transaction

- Through the partnership, Circle and Genesis will offer market solutions for businesses and developers who are seeking to generate strong positive yield from their own or customer USDC holdings
- The partnership will also provide access to USDC-based credit for businesses and merchants that are using USDC for treasury operations and business payments
- Circle and Genesis have established a leadership position providing core infrastructure supporting a new global financial system

FT Partners' Role

- FT Partners served as exclusive financial advisor to Circle
- This transaction highlights FT Partners' deep domain expertise in the digital asset and blockchain sectors, as well as its successful track record generating highly favorable outcomes for high-growth FinTech companies globally

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exclusive financial advisor to*



on its financing from



for a total amount of

\$25,000,000



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FT Partners Advises Forge on its Merger with SharesPost

Overview of Transaction

- On May 12, 2020, Forge announced its merger with SharesPost
- SharesPost is a private market alternative trading system focused on enabling retail and institutional investors and company employees to access liquidity
 - Founded in 2009, SharesPost built the first private equity marketplace, which strove to connect buyers and sellers of private securities through its proprietary trading platform
- Forge's digital platform streamlines liquidity for hundreds of unicorn issuers and thousands of institutional and retail investors from around the world
 - Leveraging its robust technology, operations and trust infrastructure, Forge delivers a suite of services that includes trading, custody, data and company solutions

Significance of Transaction

- Together, the two companies will create one of the largest global private securities marketplaces, bringing liquidity and transparency at scale to pre-IPO companies and investors
- Combined, the two will have facilitated thousands of transactions with more than \$6 billion in private market transaction volume, for hundreds of unique issuers and over 1 million customers
- The deal will provide Forge with deeper insight on private company trends, as well as bid, offer, and pricing data that provides transparency to clients and partners to better understand and engage in the private markets

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Forge
- FT Partners previously advised Forge on its [\\$70 million Series B financing](#)
- This transaction underscores FT Partners' deep alternative marketplace domain expertise and its continued success in providing buy-side advisory to top-tier FinTech companies

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on its merger with



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FT Partners Advises Clearpool on its Sale to BMO

Overview of Transaction

- On January 22, 2020, Bank of Montreal (BMO) announced that it had signed an agreement to acquire 100% of the outstanding shares of Clearpool Group ("Clearpool"), an Algorithmic Management System transforming electronic trading with a fully customizable suite of trading tools
- Headquartered in New York, Clearpool empowers market participants by providing greater transparency, efficiency and control through next generation trading technology
- Clearpool's solution provides total visibility and control, from strategy to execution, through its cloud-based algorithmic management system, execution and analytics portals
- Bank of Montreal (TSX, NYSE: BMO) is a highly diversified financial services provider based in North America

Significance of Transaction

- BMO's electronic platform (Capital Markets, Securities and Equity) has a successful, fast-growing trading business in Canada, and adding Clearpool's capabilities in algorithmic management will allow BMO to deliver next-gen trading technology to its global client base

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Clearpool
- The transaction underscores FT Partners' successful track record generating highly favorable outcomes for Capital Markets Technology companies
- This transaction also highlights FT Partners' expertise in bringing our clients together with world class strategic investors and acquirers

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as strategic and financial advisor to*



on its sale to



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FT Partners Advises BlackRock on its Acquisition of FutureAdvisor

Overview of Transaction

- On August 26, 2015, BlackRock (NYSE: BLK) announced a definitive agreement to acquire 100% of FutureAdvisor
- FutureAdvisor is a leading digital wealth management platform with technology-enabled investment advice capabilities
- BlackRock offers investment management, risk management and advisory services to institutional and retail clients worldwide and has over \$4.7tn in assets under management
- Following the transaction, FutureAdvisor will operate as a business within BlackRock Solutions (“BRS”), BlackRock’s investment and risk management platform
- The transaction is expected to close in Q4 2015

Significance of Transaction

- Combines FutureAdvisor’s tech-enabled advice capabilities with BRS’ investment and risk management solutions
- Enables BlackRock to provide a B2B digital advice platform, which helps financial institution partners both improve their clients’ investment experiences and grow advisory assets
- Empowers partners to meet the growing demand among consumers to engage with technology to gain insights on their investment portfolios
 - Demand is particularly strong among the mass-affluent, who account for ~30% of investable assets in the U.S.

FT Partners’ Role

- FT Partners served as exclusive advisor to BlackRock
- Highlights FT Partners’ continued success advising a broad range of top-tier strategic investors across the financial technology landscape

Financial Technology Partners LP FTP Securities LLC

*is pleased to announce its
exclusive role as advisor to*

BlackRock

in its 100% acquisition of



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FT Partners’ Recent Awards and Recognition

Bloomberg

Bloomberg

- FT Partners’ Steve McLaughlin was featured on Bloomberg / Bloomberg TV
- View the [full article](#) and watch the live [TV interview](#)



M&A Advisor Awards

- Technology Deal of the Year (2019)
- Cross Border Deal of the Year and Corporate / Strategic Deal of the Year (2018)
- Investment Banker of the Year (2017) – Steve McLaughlin, CEO & Managing Partner of FT Partners
- Investment Banking Firm of the Year (2016) – FT Partners



LendIt FinTech Industry Awards 2018:

- FT Partners wins Top Investment Bank in FinTech

Institutional Investor



The FinTech Finance 40:

- Steve McLaughlin ranked #1 in 2017 and 2018

The Information

Silicon Valley's Most Popular Dealmakers

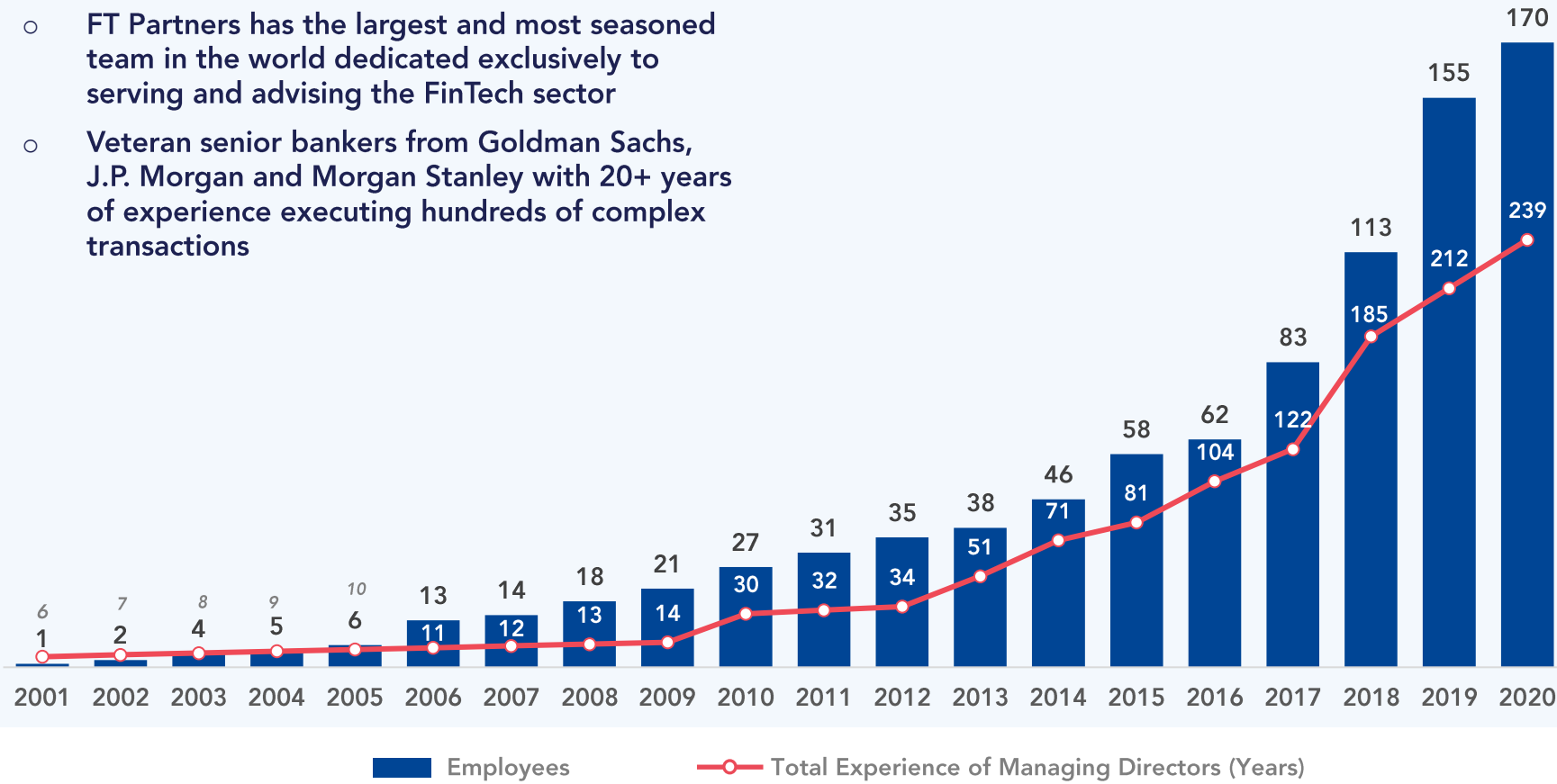
Name	Title	Company
Sam Smith	Managing Director	Golden Gate
Steve McLaughlin	Managing Partner	FT Partners
Michael Rieple	Managing Director	Golden Gate
Mark Winkler	Managing Director	Golden Gate
Paul Rosen	Managing Director	Golden Gate
Quincy Smith	Partner	Golden Gate

The Information’s “Silicon Valley’s Most Popular Dealmakers”

- Ranked as the #2 top Technology Investment Banker by The Information subscribers (2016)
- Only FinTech focused investment banking firm and banker on the list

The Largest FinTech Advisory Practice in the World

- FT Partners has the largest and most seasoned team in the world dedicated exclusively to serving and advising the FinTech sector
- Veteran senior bankers from Goldman Sachs, J.P. Morgan and Morgan Stanley with 20+ years of experience executing hundreds of complex transactions



The FT Partners Senior Banker Team

Name / Position	Prior Background	Experience / Education	Years of Experience
Steve McLaughlin <i>Founder, CEO and Managing Partner</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York and San Francisco from 1995-2002 Formerly Co-Head of Goldman Sachs' Financial Technology Group (#1 market share) Wharton M.B.A. 	25
Mohit Agnihotri <i>Managing Director</i>	J.P.Morgan	<ul style="list-style-type: none"> Formerly Managing Director and Global Head of Payments Investment Banking at J.P. Morgan Wharton M.B.A 	18
Kate Crespo <i>Managing Director</i>	RAYMOND JAMES®	<ul style="list-style-type: none"> Formerly with Raymond James' Technology & Services investment banking 14+ years of FinTech transaction execution experience Dartmouth M.B.A. 	18
Larry Furlong <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York, London and Los Angeles from 1995-2004 Wharton M.B.A. 	24
Osman Khan <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly Managing Director and Head of FIG M&A at Alvarez & Marsal 15+ years FIG deal, consulting and assurance experience at PwC 40 Under 40 M&A Advisor Award Winner in 2013 	23
Randall Little <i>Managing Director</i>	J.P.Morgan	<ul style="list-style-type: none"> 12 years as FIG / Capital Markets FinTech investment banker at J.P. Morgan 10 years as financial services technology consultant at Sun Microsystems and Ernst & Young NYU Stern M.B.A. (MBA w/Distinction) 	23
Andrew McLaughlin <i>Managing Director</i>	Deloitte.	<ul style="list-style-type: none"> 20+ years experience executing / implementing financial and operational strategy Formerly with Deloitte Consulting 	14
Amar Mehta <i>Managing Director</i>	J.P.Morgan	<ul style="list-style-type: none"> Formerly with J.P. Morgan's Technology (FinTech & Technology Services) team in New York 7+ years of FinTech transaction execution experience MBA from IIM-K (India), Bachelor's in Computer Engineering from NTU (Singapore) 	15
Mike Nelson <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly head of FinTech M&A at SunTrust Robinson Humphrey Kellogg M.B.A. 	20
Timm Schipporeit <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Morgan Stanley as Senior Executive Director of European Technology Investment Banking Team in London Formerly a Venture and Growth Investor focused on FinTech at Index Ventures 	17
Greg Smith <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly award winning Equity Research Analyst at Merrill Lynch, J.P. Morgan and Hambrecht & Quist 20+ years of experience covering FinTech as both an Analyst and Investment Banker 	24
Tim Wolfe <i>Managing Director</i>		<ul style="list-style-type: none"> Formerly with Goldman Sachs from 2000-2002 40 Under 40 M&A Advisor Award Winner 2013 Harvard M.B.A. 	18