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CAIS Media Kit

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Matt Brown

Founder, Chairman, & Chief Executive Officer | CAIS

Matt Brown is the Founder, CEO, and Chairman of CAIS. He has spent more than 30 years at the intersection of wealth management, alternative investments, and platform design. In 2009, Matt founded CAIS, the first truly open marketplace for alternative investments, where financial advisors and alternative asset managers can engage and transact directly on a massive scale.

Matt believes entrepreneurship is the major driver of economic and social change. He has spent the better part of two decades working with Endeavor, the world's leading organization for high impact entrepreneurs. During his tenure, he had the opportunity to mentor dozens of entrepreneurs from locations around the world, including Africa, Latin America, and the Middle East. Matt is honored to have been on Endeavor's South African and Turkish Boards, which ultimately led to a position on the Global Board of Directors. This experience deepened his belief that helping entrepreneurs build and scale their businesses promotes economic growth and prosperity. It is his personal mission to ensure that anyone with a dream, and the drive to achieve it, has an equal opportunity to make it happen.

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Brendan Cuddihy

Chief Operating Officer | CAIS

Brendan Cuddihy is the Chief Operating Officer at CAIS. He oversees the Operations, Client Service, and Integrations teams. Brendan is responsible for funds and investment product operations, including onboarding, integration of workflows, reporting, and investor/manager relations. He has more than 10 years of experience in the asset management and financial services industry, having worked at US Bancorp and Moody's Corporation. Brendan graduated Cum Laude with a BA in Economics and received his MBA from Marist College. Brendan holds his Series 7 and Series 63 licenses.

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Penny DeFrank

Managing Director, People Experience | CAIS

Penny DeFrank serves on our executive committee as our Managing Director of People Experience, leading the Talent Acquisition, People Operations and Talent Development teams. She has deep expertise in building and guiding the talent of high-growth tech companies—with a focus on fostering a culture where employees can do their best work. Penny's former employers were made up of a series of early- to mid-stage, high-growth companies across fintech, cyber security and e-commerce, including Corelight, Marqeta, Monitise, White Hat Security and RichRelevance.

Prior to her career in tech, Penny enjoyed more than 10 years at McKinsey & Company where she led all non-consulting operations across four locations on the west coast. Penny holds a BS in Information Systems Management and a Master's in Human Resources and Organization Development, both from the University of San Francisco.

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Josette Leslie

Chief Financial Officer | CAIS

Josette Leslie is the Chief Financial Officer at CAIS. She brings over 20 years of financial leadership experience across banking, fintech, and technology sectors. Josette joins CAIS from Affinity, where she most recently served as Chief Financial Officer. Prior to that, Josette held positions including Interim CFO and Vice President of Finance at Squarespace, where she played a key role in increasing the company's revenue from \$100M to approximately \$800M, leading to its successful IPO in 2021. Before that, she enjoyed 11 years at E*TRADE where she was the second hire on their finance team, and was instrumental in building and scaling the analytics and FP&A functions from the ground up. Earlier, she was the Corporate FP&A Manager at Instinet, where she joined during a period of rapid growth and supported another successful IPO. Josette began her career at PNC Bank, where she honed her skills in credit analysis and portfolio management.

Josette holds a Bachelor's degree in Finance & Accounting from the Leonard Stern School of Business at NYU, and has also earned her CFA designation.

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Michael Richman

Managing Director, General Counsel | CAIS

Michael Richman is the General Counsel at CAIS and is responsible for the firm's legal, compliance, and regulatory affairs. He has more than 13 years of industry experience with a focus on alternative investments and wealth management. Prior to CAIS, Michael served as Director and Associate General Counsel for Alternative Investments at UBS. Prior to UBS, Michael worked at Fortress Investment Group. Michael received his BS from Yeshiva University and JD from Fordham University School of Law. Michael holds the FINRA Series 7 license.

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Timothy Shannon

President | CAIS

Tim Shannon is President at CAIS and is responsible for firm management and business development. He has more than 27 years of experience in alternative investments and wealth management. Shortly after launching his career, he founded Praxis Advisory, which was later acquired by Bank of America. He has held positions as Head of Business Development at Morgan Stanley Hedge Fund Partners, Managing Director at Citigroup Private Bank, COO of Traxis Partners and COO of Bernstein Private Wealth Management. Tim received a BS from the University of Pennsylvania and an MBA from The Wharton School. He holds his FINRA Series 3, 7, 24, and 63 licenses.

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Chris Crawford

Managing Director, Operations and Risk Management | CAIS

Chris Crawford heads the Operations team and is responsible for platform funds and investment product operations, including onboarding, integration of workflows, reporting and advisor/manager relations. Chris also chairs the CAIS Operational Risk Management Committee. He has over 20 years of operational experience in alternative investment firms, including Mizuho, Vegasoul, Traxis Partners, and R. G. Niederhoffer Capital Management. Chris received his BS from Indiana University of Pennsylvania and MBA from Villanova University.

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Marc Premelaar

Senior Managing Director, Structured Investments | CAIS

Marc Premelaar heads the Structured Products team at CAIS. Marc is responsible for overseeing the origination, distribution, and client coverage across all regions for the Structured Products team. He has more than 13 years of capital markets and financial services industry experience.

Prior to joining CAIS, Marc worked at Barclays Wealth, K2 Global Consulting, and UBS Wealth Management. Marc received his BS from the University of Maryland and holds FINRA Series 3, 7, 24, and 63 licenses.

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Brad Walker

Chief Client and Product Development Officer | CAIS

Brad Walker is Chief Client and Product Development Officer at CAIS. He oversees client management, product origination, product support, product distribution, and investment strategy. He also leads the firm's enterprise relationships. Brad has more than 19 years of asset management and financial services experience. Prior to CAIS, Brad was the Director of Platform Distribution for Highbridge. Brad also worked at Morgan Stanley and Carlin Equities LLC. Brad received his BSBA from the University of Delaware. He holds FINRA Series 7, 24, 31, and 63 licenses.

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Kan Kotecha

Chief Technology Officer | CAIS

Kan Kotecha is the Chief Technology Officer at CAIS. Kan is a seasoned leader with an impressive 30-year tenure at Google and Morgan Stanley. At Google, he was most recently Vice President of Engineering and Chief Information Officer of “Google Works”. At Morgan Stanley he served as Managing Director and Chief Technology Officer of Wealth Management and Head of Capital Markets Technology. Throughout his career, Kan has excelled in developing cutting-edge products, driving digital transformation initiatives, scaling organizations, and effectively managing global teams. His experience and approach in these areas make him ideally suited to lead our technology strategy forward, as we build upon our tremendous foundation and deliver best-in-class products for our clients.

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Chris Zuczek

Chief Product Officer | CAIS

Chris Zuczek is the Chief Product Officer at CAIS, where he brings over 24 years of experience in executive leadership and product management within the financial services, fintech, and wealth management industries. In his role, he oversees the entire product lifecycle, from conceptualization to launch and beyond, shaping CAIS' product strategy, driving innovation, and ensuring that the company's offerings meet the evolving needs of clients while aligning with CAIS' objectives.

Prior to joining CAIS, Chris held positions as Chief Product Officer at Skience, Chief Product Officer at Discovery Data, and Vice President of Product Management at Albridge Solutions. He began his career at MetLife, where he held various roles over 15 years in Technology Development, Support, Analytics, and Service Delivery. Chris earned his bachelor's degree in business administration and finance from Monmouth University.

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Alex Cavalieri

Director, Head of Marketing | CAIS

Alex Cavalieri serves as the Director, Head of Marketing overseeing content, digital, CAIS IQ learning design, and project management. Prior to CAIS, Alex Cavalieri was the Head of Marketing and Strategy at CION Investments and Advisor I/O (A CION Company). Before that, he served as a Vice President at BlackRock, leading digital growth areas for iShares and BlackRock.com U.S. experiences. He also held other roles in BlackRock overseeing digital experiences within the Retirement Marketing division and BlackRock's Campus Recruiting, as well as various strategy, marketing, and sales roles at Glocal, Omni Corporation, and Workbridge Associates. Alex received his Bachelors in Communications and Rhetorical Studies from Syracuse University.

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Brooke Jones

Managing Director, Platform Solutions & Operations | CAIS

Brooke leads the team responsible for ensuring close alignment of the CAIS ecosystem partners with our clients and the CAIS technology and product management team. She is responsible for Enterprise program management as well as operational data solutions & delivery. Brooke has over twenty years of leadership experience in technology, data, and analytics solutions delivery across many industries. Prior to CAIS, she worked at Investnet, who acquired the data and analytics consulting group Brooke started in 2009. Brooke received a BA in Computer Science from Princeton University.

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Kristin Magnier

Director, Advisor Services | CAIS

Kristin Magnier is the Director of Advisor Services. Kristin has over 17 years of experience in retail and institutional client service, for both traditional and alternative investments. Prior to CAIS, Kristin worked at abrdn for 11 years, where she was Head Client Service for the Americas region. Prior to that, Kristin was a Retail Account Supervisor at Jennison Associates and a Trader at Vanguard Brokerage Services. Kristin received her BS in Finance from the University of Delaware. She holds the FINRA Series 7, 63 and 24 licenses.

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Judah Schulman

Director, Product Specialist | CAIS

Judah Schulman is a Director on the Alternatives Investment group at CAIS. Judah has over nine years of experience in the asset management and financial services industry. Prior to joining CAIS, Judah worked in New York City for Morgan Stanley and UBS in their Wealth Management Divisions. As a Director and Product Specialist, Judah Co-Heads the Fund Sales team at CAIS and oversees the ongoing management and new businesses development across the firm's wealth management clients. Judah received his BS in Psychology from Yeshiva University and holds the CAIA charter as well as FINRA Series 24, 7 and 63 licenses.

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