



INDUSTRY SPOTLIGHT

25 Women-Led Single Family Offices

A Snapshot of the Landscape of
Single Family Offices in the U.S. and
the Women Driving Their Success

2023

Contents

1	Introduction
3	Julie Baker, Broad Family Office
4	Jennifer Bawden, Bawden Capital
5	Pamela Breuckmann, Ferrell Capital
6	Natalie Brod, Crystal Family Office
7	Laura Cabot Carrigan, Cabot-Wellington
8	Emily Clifford, Alta Mara Capital
9	McCall Cravens, Heinz Family Office
10	Caroline Davis, Keller Enterprises
11	Margo Doyle, S-Cubed Capital
12	Renata Erlikhman, OW Management
13	Dawn Fitzpatrick, Soros Fund Management
14	Annette Franqui, Forrestal Capital
15	Rosalind Hewsenian, Helmsley Trust
16	K.C. Krieger, Broad Family Office
17	Leslie Lenzo, Hershey Trust Company
18	Kate Lindberg, Sawdust Investment Management
19	Lisa Bhathal Merage, RAJ Capital
20	Cindy Mihalova, Ligo Partners
21	Sam Miller Hicks, Money In Motion
22	Suna Said, Nima Capital
23	Tina Schockling, Blue Spruce Capital
24	Katie Sproul, Halstatt Partnership
25	Lynn Tilton, Patriarch Partners
26	Wendy Wing, Mantucket Capital
27	Marie Young, Bayshore Global Management
28	Conclusion
29	About FINTRX

Introduction

We are proud to present our most recent report, focusing on 25 single-family offices across the United States, all of which are managed and led by women. This examination stands as a testament to the comprehensive research carried out by the FINTRX data team, offering a unique and insightful view of the single family office landscape. By leveraging FINTRX data, we aim to showcase the accomplishments of these 25 female trailblazers and highlight the impact of their leadership within the private wealth space.

The US family office landscape has undergone significant changes in recent years. As the number of high-net-worth individuals continues to grow, so too has the demand for customized wealth management solutions. With that said, family offices have emerged as a popular option for affluent families looking to consolidate their financial affairs and gain access to a wider range of investment opportunities. Despite the highly opaque nature of the family office landscape and the difficulties of pinpointing exact statistics surrounding these firms, it's clear that the private wealth ecosystem is constantly and rapidly evolving.

In conjunction with the significant rise in the number of family offices in recent years, it's no surprise that the industry is also experiencing an amplified push for diversity and inclusion within its leadership and investment management teams. According to FINTRX research, women currently make up an estimated **14%** of family office C-suite executives and roughly **9%** of investment committee members. While still a small percentage, women are gradually emerging as more prominent figures within the leadership of family offices, and we are confident this upward trend will sustain its momentum in the future.

The women presented throughout this report represent firms across nine different states and an estimated average of \$2.4B+ in assets under management (AUM). Of the 25 women featured, seven of them founded, co-founded or are the source of wealth for their respective family offices. Additionally, 19 of these women are C-suite executives, with 11 serving as CIO and nine as CEO. Each of these highlighted family offices have been hand-selected for their clear representation of female inclusion and leadership within the industry.





Julie Baker

Broad Family Office [↗](#)

Chief Executive Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Los Angeles, CA	Eli Broad	Real Estate	1999

Bio

Education



San Diego State University



University of Southern California

Julie Baker is a seasoned finance professional with extensive experience in taxation and financial management. She began her career as a Senior Tax Manager at KPMG and later worked as a Tax Manager at Grant Tani Barash & Altman. In 2001, Baker joined The Eli and Edythe Broad Foundation as a Finance Director, overseeing financial operations. She then transitioned to the Broad Family Office, where she held various leadership positions, including Senior Finance Director, Senior Tax Director, and eventually CEO. Baker holds a Master of Business Taxation from USC and a B.S. in Finance from San Diego State University.

The Broad Family Office, based in Los Angeles, CA, serves as the single-family office responsible for managing the personal assets of Eli Broad for the benefit of the Broad Foundation and its activities. The foundation focuses on improving the quality of elementary and secondary public education, particularly in large urban school districts across the United States. The family office is committed to both public and private equity investments, spanning various sectors, regions, and asset classes. It actively engages in alternative investments, including hedge funds, private equity, real estate, and direct investments. With a preference for established managers and a minimum track record requirement, the Broad Foundation takes a diligent approach to its investment decisions. The family office maintains a strong internal investment team and closely manages its investments in-house, ensuring a focused and strategic approach to wealth management.

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Jennifer Bawden

Bawden Capital [↗](#)

Founder & Chief Executive Officer

Location

New York, NY

Wealth Creator

Bawden Family

Wealth Origin

Oil & Gas

ESG Investor



Bio

Education

FIDM FIDM - Los Angeles



Harvard University

Jennifer Bawden is the highly accomplished founder of Bawden Capital, an investment firm dedicated to transforming alternative energy and homeland security through groundbreaking technologies. With over 24 years of expertise in disruptive technologies, venture capital, and macroeconomic strategy, Jen has co-founded an Anti-Terrorism Technology company that developed disruptive sensor technology for protecting global infrastructure from chemical, biological, radiological, and nuclear threats. Her solutions have earned government awards and grants. Jen's influential network spans finance, venture capital, and homeland security, enabling her to identify strategic investment projects and partnerships. She is a respected speaker on topics including homeland security, macroeconomics, and socially responsible investing.

Jen's commitment extends beyond investments, as she actively contributes to the growth of previously invested companies and facilitates M&A opportunities for partnering family offices. With a remarkable ability to anticipate market trends, she has gained recognition as a best-selling author and global speaker. Jen's predictions, such as the 2008 financial crisis and subsequent gold price rise, highlight her keen foresight. She also shares her insights as a contributing author to renowned financial news sites. Additionally, Jen's background in freestyle skiing and modeling, including collaborations with skiwear brands and working as a stunt skier, adds to her diverse experience. She holds a Bachelor's degree from the University of Western Ontario, attended Harvard Business School Executive Education, and is fluent in multiple languages.

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Pamela Breuckmann

Ferrell Capital [↗](#)

President & Chief Executive Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Leawood, KS	Ferrell Family	Oil & Gas	1998

Bio

Education



University of Kansas

Leveraging her strong background in finance, business analysis and planning, Pamela Breuckmann oversees the daily operations of Ferrell Capital and ensures the execution of investment strategies in her roles as the CEO and President. She has also previously served as CFO at Ferrell, and in 2013, she was appointed to the Board of the Ferrell family's company, Ferrellgas, Inc. Before joining Ferrell Capital in 2007, Pamela Breuckmann held various key positions in the finance industry, beginning as an auditor at Deloitte, and spending time as VP of Finance and CFO of different financial services companies. She holds a B.S. in Business Administration and Accounting and a Master of Accounting and Information Systems from the University of Kansas as well as a CPA designation.

Ferrell Capital, based in Leawood, KS, operates as a single-family office, managing the wealth of the Ferrell Family. The family's wealth is derived from Ferrellgas, Inc., a prominent propane distribution company in the United States. Ferrell Capital was established to oversee the financial, business, and personal affairs of the family. The firm provides advice on asset allocation, manager and investment selection, discretionary management, and the formation and management of investment vehicles. Ferrell Capital takes a diversified approach to investing, considering public equity, private equity, real estate properties, long-only funds, and more. The firm maintains a focused and strategic approach to wealth management, valuing portfolio diversity and historically pursuing investments on a global scale.

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Natalie Brod

Crystal Family Office [↗](#)

President

Location	Wealth Creator	Wealth Origin	Year Founded
Bay Harbor Islands, FL	Brod Family	Financial Services	1994

Bio

Education



University of Texas



The New School

Natalie Brod is a highly accomplished professional, currently serving as the President of the Crystal Family Office. In addition to her leadership role for the Brod family office, she is also the Partner and Chief Marketing Officer at Crystal Capital Partners, a fintech SaaS company in the alternative investment space. Brod brings a wealth of experience to her positions with her involvement in the investment industry, an M.S. in Non-Profit Management from The New School for Management and Urban Policy, and a B.B.A. in Finance from the University of Texas at Austin. She has also spent time with The Sundari Foundation as a fundraising and development director.

The Crystal Family Office, based in Bay Harbor Islands, FL, was established in 1994 as a single-family office solution for the Brod Family, renowned entrepreneurs and innovators in the financial industry. Led by Natalie Brod, the family office focuses on preserving and managing the family's wealth across generations, transitioning from a business-centric family to a "family enterprise." The office invests in various alternative asset classes, including private equity, hedge funds, fund of funds, and direct investments.

With a global approach to investment sourcing and a commitment to portfolio diversification, Crystal Family Office seeks optimal investment opportunities that align with the family's values, aiming to protect and grow wealth for the present and future generations of the Brod family.

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Laura Cabot Carrigan

Cabot-Wellington [↗](#)
Executive Chair

Location	Wealth Creator	Wealth Origin	Year Founded
Boston, MA	Thomas & Virginia Cabot	Industrials	1996

Bio

Education



University of Vermont



Columbia University

Laura Cabot Carrigan is an accomplished professional with extensive experience in family office management and philanthropy. She has served in various leadership roles within the Cabot-Wellington family office, including Managing Director from 2010 to 2015, Trustee since 2007, and currently as the Executive Chair, where she oversees the investment strategy and overall management of the firm. Carrigan's extensive expertise in family governance, asset allocation and investment strategy help drive the firm's success under her leadership. She received a Bachelor's degree from the University of Vermont and her Master of Public Administration from Columbia.

Based in Boston, MA, the Cabot-Wellington family office represents the Thomas D. and Virginia W. Cabot families. It oversees the Cabot Family Charitable Trust and the Virginia Wellington Cabot Foundation, independent foundations established by Godfrey L. and Thomas D. Cabot to promote and sustain philanthropic activities within the Cabot family.

The office engages in diversified investments across public and private equity, spanning various sectors, regions, and asset classes. While the majority of their investments are managed externally, the family office also actively invests in private equity, including start-up funds. With a longstanding tradition of charitable giving and public service that dates back to 1942, the Cabot-Wellington family office embodies a commitment to making a positive impact in society, alongside prudent financial management.

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Emily Clifford

Alta Mara Capital

Chief Executive Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Boca Raton, FL	Al Rabil	Real Estate	2022

Bio

Education



William & Mary

Emily Clifford is a seasoned finance executive and the current CEO of Alta Mara Capital, the family office of the Rabil family in Palm Beach, Florida. She brings over 15 years of experience in finance and investment banking to her role at Alta Mara, having worked at Forbes, Belle Haven Investments, and JP Morgan Chase & Co. before joining the firm. With a degree from William & Mary, Clifford's extensive experience and academic background have prepared her for her current role leading the Rabil family's investment strategy. At Alta Mara, she oversees a team of investment professionals responsible for managing and growing the family's wealth.

Established in 2022, Alta Mara Capital is a single-family office that invests and manages the wealth of Al Rabil and his family. With a focus on real estate, the firm's investment strategy leverages Al Rabil's industry experience and expertise to identify high-value opportunities and make timely investments.

The firm's single-source capital provides flexibility in investment horizons and deal terms, allowing Alta Mara to take a global approach to its investment sourcing. Sectors and industries of interest include oil & gas, energy infrastructure, and specialized real estate such as medical offices, senior living facilities, self-storage, and student housing. Emily Clifford's leadership and expertise have been instrumental in guiding Alta Mara's investment strategy and positioning the firm for continued growth and success.

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McCall Cravens

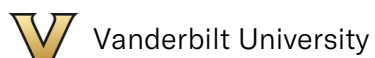
Heinz Family Office

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Pittsburgh, PA	Heinz Family	Food & Beverage	1941

Bio

Education



Harvard University

McCall Cravens is the Chief Investment Officer for the Heinz Family Office with a strong and impressive background in investment management. Cravens previously held the role of CIO at Hunt Global Investments, overseeing investment activity for the family office of Ray L. Hunt and his descendants. Prior to that, she served as the Managing Director of Investments in the Endowment office at SMU and has worked with reputable private equity firms, including Pamlico Capital and Lehman Brothers Real Estate Partners. She received her B.S. from Vanderbilt University and an M.B.A. from Harvard. Trusted Insight has recognized her as one of the "Top 30 Women Chief Investment Officers" and one of the "Top 30 Most Influential Women in University Endowments," while aiCIO honored her as one of the top "Forty Under Forty." In addition to her professional achievements, Cravens serves on the boards and investment committees of notable organizations such as The Children's Institute of Pittsburgh, The Dietrich Foundation, and Fund Evaluation Group.

The Heinz Family Office, based in Pittsburgh, Pennsylvania, operates as a low-profile single-family office responsible for managing and investing the wealth of the Heinz family, who are heirs to the H.J. Heinz Company founded by Henry John Heinz in 1869. While little information is publicly available about their allocation preferences, the Heinz Family Office is known to invest in both public and private equity across various sectors, regions, and asset classes, with a particular emphasis on venture capital and private equity. The firm is a mature and seasoned family office with a long history of successful investing on behalf of the Heinz family.

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Caroline Davis

Keller Enterprises

President

Location

Alexandria, LA

Wealth Creator

Keller Family

Wealth Origin

Agriculture

ESG Investor



Bio

Education



Vanderbilt University



The Ohio State University

As President of Keller Enterprises, Caroline Davis has played a pivotal role in transforming the firm from an opaque organization into a dynamic company. She has also helped shape Keller Enterprises' vision of growing resources and making a positive impact in the world by maintaining a strong commitment to mission-driven investing and philanthropy.

Davis previously served on the firm's Board of Directors and also spent time as Principal before being named President. She is a dedicated philanthropic partner, and her passion for innovative models and her engagement with organizations like the CCC Alliance and The ImPact exemplify her commitment to making a meaningful difference. Davis holds a degree from Vanderbilt University and an MA in Sociology from Ohio State University.

Founded in 1998, Keller Enterprises is a single-family office headquartered in Alexandria, LA that serves as the investment and wealth management vehicle for Caroline Keller and her family. With a rich heritage rooted in the agriculture industry, the family established Keller Enterprises with the vision of ensuring its continuity by entrusting subsequent family generations to lead the firm. At the heart of their business endeavors is Inglewood Farm, a prominent nature-first organic farm situated in the heart of Louisiana, which the Keller family owns and operates. The firm emphasizes investments that align with their vision and values and primarily focuses on energy and agriculture in their investment portfolio.

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Margo Doyle

S-Cubed Capital [↗](#)

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Menlo Park, CA	Mark Stevens	Venture Capital	2011

Bio

Education



Georgetown University



Harvard University

As a 20-year veteran of the industry, Margo Doyle brings an extensive background in investment consulting, venture capital, and growth equity to her role as CIO at S-Cubed Capital. Prior to joining S-Cubed in 2015, she spent time as an Associate at Kodiak Venture Partners and as Managing Director at Cambridge Associates. Throughout her career, Doyle has successfully built and managed portfolios for institutional investors ranging from \$100 million to over \$150 billion in AUM and has demonstrated a keen ability to identify emerging talent in the investment landscape. Her expertise spans various asset classes, with a particular focus on the private markets, and her deep understanding of investment and governance practices has made her a valued advisor to investment committees, family offices, endowed institutions, and public pensions. She earned her undergraduate degree from Georgetown University and her MBA from Harvard.

S-Cubed Capital is a single family office in Menlo Park, CA that serves as the investment and wealth management entity for Mark Stevens and his family. Mark Stevens, a former managing partner at Sequoia Capital, is a renowned venture capitalist with a notable net worth of over \$2 billion. As the CIO of S-Cubed Capital, Doyle is responsible for overseeing a diverse portfolio of assets, including public and private holdings, real estate LLCs, and a comprehensive direct investment program. Additionally, she plays a vital role in guiding the family's significant philanthropic initiatives. Doyle's entrepreneurial leadership and commitment to fostering talent make her a valuable asset in building and growing organizations within the financial industry.

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Renata Erlikhman



OW Management

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Los Angeles, CA	Oprah Winfrey	Media & Entertainment	2010

Bio

Education



University of California, Los Angeles

Renata Erlikhman is the Chief Investment Officer of OW Management and a well-established investment professional with a diverse background in the financial industry. She began her career as an Analyst at Lehman Brothers and later served as an Associate at CIM Group. In 2010, she joined OW Management as the Director of Investments, overseeing the management of wealth for Oprah Winfrey and her family. In recognition of her accomplishments, Renata was appointed Chief Investment Officer of OW Management in 2018. Her expertise and strategic insights have been acknowledged by the industry, earning her a spot on AICIO's prestigious "40 Under Forty" list in 2017.

OW Management, based in Los Angeles, California, is a single-family office established in 2010 to manage the wealth of Oprah Winfrey and her family. Renowned as a talk show host, television producer, actress, and philanthropist, Oprah Winfrey is best known for her iconic talk show, The Oprah Winfrey Show. She has made significant contributions to education and has been recognized as one of the most generous Americans. OW Management adopts a diversified investment approach, investing in both private and public equity across various sectors, regions, and asset classes. Under Erlikhman's strong leadership, the firm places a particular emphasis on supporting companies led by women, aligning with Oprah Winfrey's commitment to empowering women and promoting gender equality.

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Dawn Fitzpatrick

Soros Fund Management

Chief Investment Officer

Location

New York, NY

Wealth Creator

George Soros

Year Founded

1996

ESG Investor



Bio

Education



University of Pennsylvania

Dawn Fitzpatrick is the CEO and CIO of Soros Fund Management LLC and has over 25 years of experience in the financial industry. Before joining Soros in 2017, she held significant leadership roles at UBS and its predecessor organizations, serving as the Head of Investments for UBS Asset Management, managing over \$500 billion in client capital. Prior to that, Fitzpatrick was the CEO and CIO of the O'Connor hedge fund business and began her career as a trader on the American Stock Exchange and the Chicago Board of Options exchanges.

In addition to her role at Soros Fund Management, Fitzpatrick actively participates in various advisory boards and committees including the Open Society Foundations' Economic Justice Program Advisory Board, the Federal Reserve Bank of New York's Investor Advisory Committee on Financial Markets, and the Advisory Council of The Bretton Woods Committee. Furthermore, she holds a non-executive Director position on the Barclays Board. She has been honored on numerous prestigious lists, including the Worth Power 100 and Barron's "100 Most Influential Women in U.S. Finance" for her significant contributions to the industry. She holds a B.S. in Economics from UPenn.

Soros Fund Management, founded by George Soros in 1970, is a private investment management firm that operates as a family office. While it previously functioned as a hedge fund, it now focuses on managing investments in public equity, fixed income, foreign exchange, commodities, private equity, and venture capital funds. The firm has a global investment approach and has made significant investments in various industries, including transportation, energy, retail, and finance.

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Annette Franqui

Forrestal Capital

Co-Founder & Partner

Location

Miami, FL

Wealth Creator

Staton Family

Wealth Origin

Food & Beverage

Year Founded

2003

Bio

Education



University of Pennsylvania



Stanford University

Annette Franqui is a highly accomplished business executive with over 30 years of experience in the financial industry. She is a founding partner of Forrestal Capital, a trusted business and investment advisor established in 2003, where she plays a pivotal role in guiding strategic decisions for Latin American families, particularly those associated with the founding group of Panamco. Franqui served as the CFO of Panamco, the largest Coca-Cola bottler outside the United States, operating in eight Latin American countries and listed on the NYSE.

Franqui's background includes notable positions at JP Morgan and Goldman Sachs, and she holds a B.S. in Economics from UPenn, an M.B.A. from Stanford University, and is a CFA charterholder. She serves on the Board of Directors for Arcos Dorados and Halstatt, LLC, while also making significant contributions as a volunteer on the national Board of Directors of AARP and co-sponsoring partnerships and investments in commercial and residential properties in the southeastern United States.

Forrestal Capital specializes in investing client assets primarily in direct private equity and venture capital transactions across various industries and regions. Their investment portfolio encompasses diverse sectors such as medical devices, alcoholic beverages, food, distribution and logistics, supermarket automation, and hospitality. With a focus on Latin America, the US, and Europe, Forrestal Capital leverages its expertise and network to identify compelling investment opportunities.

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Rosalind Hewsenian

Helmsley Trust [↗](#)

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
New York, NY	Helmsley Family	Real Estate	2008

Bio

Education



State University of New York



Pace University

Roz Hewsenian joined Helmsley in 2010 as the Deputy Chief Investment Officer and now serves as the CIO. Hewsenian brings a wealth of expertise to the firm and is responsible for providing strategic direction to the Trust's investment program and overseeing its implementation.

Prior to her work at Helmsley, Hewsenian served as CEO at global equity firm, Clay Finlay, and spent a significant portion of her career at Wilshire Associates, serving as a senior investment consultant for governmental pension funds. In this role, she worked closely with clients such as the California Public Employees' Retirement System (CalPERS). Hewsenian also worked at Dimensional Fund Advisors and served as the Manager of Pensions and Investments at PepsiCo, Inc. She holds a Bachelor of Science degree from the State University of New York at Oneonta and an M.B.A. from Pace University.

The Helmsley Trust Family Office, based in New York, NY, is a single-family office that manages and invests the wealth of the Helmsley family, whose wealth was primarily created through real estate investments. Through the Leona M. and Harry B. Helmsley Charitable Trust, established in 1999, the family supports various nonprofit organizations and initiatives in the areas of health, selected place-based initiatives, education, and human services. With a long history of philanthropic giving, the Helmsleys have made significant contributions to numerous organizations throughout their lifetimes.

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Sam Miller Hicks

Money In Motion [↗](#)

Chief Executive Officer

Location

San Francisco, CA

Wealth Creator

Janet McKinley

Year Founded

2011

ESG Investor



Bio

Education



University of Pennsylvania



University of Pittsburgh

Sam Miller Hicks is the CEO of Money in Motion and also the Global Head of Impact at Advance Global Capital Ltd. She developed a passion for investing at a young age through her father's guidance, and her early exposure to global economic disparities motivated her to pursue a career focused on making a positive impact in underserved communities.

With a diverse background spanning academia, banking, corporate leadership, and sustainable business consultancy, Hicks has accumulated a wealth of experience. Prior to MiM, she served as the Head Administrator for the Central European University's Graduate Program in Economics in Prague, worked in corporate and investment banking at Citibank, held leadership positions at global medical device company, Align Technology, and founded Xanh, a sustainable business consultancy that empowers small businesses while promoting sustainable practices.

Money in Motion LLC, the family office of Janet McKinley, was established to drive meaningful change through strategic grants and impact investments. With a focus on inclusive financial services, climate change mitigation and adaptation, innovative education initiatives, and humanitarian initiatives, Money in Motion aims to create positive social and environmental impact globally. The organization leverages its expertise in finance, impact investing, and philanthropy to support insightful entrepreneurs and organizations that address pressing societal challenges. With both philanthropic and investment capital at its disposal, Money in Motion actively seeks to put money to work in underserved communities, fostering sustainable and inclusive economic growth.

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K.C. Krieger

Broad Family Office [↗](#)
Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Los Angeles, CA	Eli Broad	Real Estate	1999

Bio

Education



Colby College



University of London

K.C. Krieger has been an integral part of The Broad Foundation & the Broad Family Office since 2001, playing a crucial role in managing the Broad family's investment portfolio. During her 15 years with the organization, Krieger has demonstrated her expertise and dedication, progressing from an investment analyst to CIO. Her strategic insights, hard work, and loyalty have earned her recognition as one of the top 30 female limited partners in private equity and one of the top 30 rising stars in the family office by Trusted Insight. Prior to Broad, Krieger served as a senior consulting associate and team leader with Cambridge Associates. She holds a bachelor's degree in economics from Colby College and is a CFA charter holder.

The Broad Family Office, based in Los Angeles, CA, serves as the single-family office responsible for managing the personal assets of Eli Broad for the benefit of the Broad Foundation and its activities. The foundation focuses on improving the quality of elementary and secondary public education, particularly in large urban school districts across the United States. The family office is committed to both public and private equity investments, spanning various sectors, regions, and asset classes. It actively engages in alternative investments, including hedge funds, private equity, real estate, and direct investments. With a preference for established managers and a minimum track record requirement, the Broad Foundation takes a diligent approach to its investment decisions. The family office maintains a strong internal investment team and closely manages its investments in-house, ensuring a focused and strategic approach.

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Leslie Lenzo


Hershey Trust Company 
Chief Executive Officer & CIO

Location	Wealth Creator	Wealth Origin	Year Founded
Hershey, PA	Hershey Family	Food & Beverage	1905

Bio

Education

 Georgetown University

 Boston University

Leslie Lenzo is the CEO and CIO of the Hershey Trust Company, overseeing both the activities of the trust and the investments of the Hershey family office. Lenzo began her career in the investment program at Partners Health Care in Boston and later transitioned to the sell side, conducting equity research on Healthcare Services at SG Cowen. She also held served as CIO at Advocate Aurora Health, where she oversaw the investment of \$14 billion in corporate and pension assets, and prior to that, she was a senior member of the investment team at Northwestern Memorial Healthcare in Chicago.

Lenzo has extensive expertise in portfolio construction, asset allocation, risk management, due diligence, and program governance and is committed to cultivating internal investment talent and fostering a collaborative and intellectually stimulating environment. She holds a BA in Economics and Government from Georgetown University and an MBA in Finance from Boston University and is a CFA charter holder.

Hershey Trust Company, established in 1905 by Milton S. Hershey, is a Pennsylvania-chartered trust company that acts as the trustee and investment advisor for the Milton Hershey School Trust, The M.S. Hershey Foundation, and the Hershey Cemetery Perpetual Care Trust. Through its top-tier trust and investment management services, Hershey Trust Company supports these trusts and the organizations they benefit in fulfilling their long-term goals in perpetuating the legacy and vision of Milton and Catherine Hershey.

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Kate Lindberg

Sawdust Investments [↗](#)

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Chicago, IL	Michael Krasny	Technology	2003

Bio

Education



Middlebury College



University of Chicago

With over 15 years of expertise in the field, Kate Lindberg is responsible for strategic asset allocation, implementing risk models, and optimizing investment performance as the CIO of Sawdust Investment Management. Before joining Sawdust in 2005, Lindberg served as a Vice President and founding member of the Northern Trust Private Equity Fund of Funds and as an Associate at William Blair Mezzanine Capital. She also gained valuable experience at the First National Bank of Chicago, where she held multiple roles including Director in High Yield and Assistant Vice President in Corporate Banking.

Lindberg's educational background includes an MBA in Finance from the University of Chicago and a BA in Economics from Middlebury College. Outside of her professional responsibilities, Lindberg serves as an Advisory Board Member for Invest for Kids and the Illinois Growth and Innovation Fund (ILGIF), as well as a Strategic Council Member of the Private Equity Committee for the Private Directors Association.

Founded in 2003, Sawdust Investments is a single-family office headquartered in Northbrook, IL. The firm specializes in investing and managing assets for Michael Krasny, the founder of Computer Discount Warehouse (CDW), established in 1984 as an online store offering IT products. The company experienced significant growth over the years and in 2007, it was acquired by Madison Dearborn Partners in a transaction valued at \$7.3 billion. In addition to managing Krasny's wealth, Sawdust Investments also oversees an investment portfolio that contributes to the philanthropic initiatives of The Circle of Service Foundation.

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Lisa Bhathal Merage

RAJ Capital [↗](#)

Co-Founder & Managing Partner

Location	Wealth Creator	Wealth Origin	Year Founded
Newport Beach, CA	Bhathal Family	Retail	2006

Bio

Education



University of Southern California



University of Pennsylvania

Lisa Merage is a prominent business leader, Co-Founder, and Managing Partner of RAJ Capital, the alternative asset platform of the Bhathal Family Office based in Newport Beach. The Bhathal family established their wealth through their renowned women's swimwear business, RAJ Swim, where Merage served as CEO from 2006 to 2016. Lisa's entrepreneurial achievements and expertise have garnered attention, earning her appearances on various fashion and business television segments and prestigious recognitions such as the "Women in Business" Award from the Orange County Business Journal.

Beyond her business endeavors, Lisa is an active philanthropist with a passion for the arts and education. She serves on the Board of the Orange County Museum of Art and is involved with the Segerstrom Center as an Angel of the Arts. Lisa's commitment to education reform, economic growth, and national security is evident through her role as Chair of the Board of Gen Next, a nonprofit organization.

Furthermore, Lisa and her family co-own Sacramento Basketball Holdings LLC, which includes the Sacramento Kings franchise, Golden 1 Center, the Sawyer Hotel and residences, and the development of the Downtown Commons entertainment and sports district in Sacramento. Lisa's educational background includes a degree from USC's Marshall School of Business and a certificate in Social Impact Strategy from the University of Pennsylvania.

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Cindy Mihalova

Ligo Partners [↗](#)

Chief Investment Officer

Location

Miami, FL

Wealth Creator

Alec Andronikov

Wealth Origin

Entrepreneur

Year Founded

2019

Bio

Education



University of Geneva



Pace University



York University

Cindy Mihalova is the CIO of Ligo Partners and a highly skilled professional with extensive experience in quantitative modeling and valuation within the realm of family offices and private equity funds. She also currently serves as a Valuation Director at Valora Partners, working closely with large family businesses, institutional investors, trusts, multinationals, operating companies, and private individuals.

Prior to Valora, Cindy held valuation specialist positions at PricewaterhouseCoopers, where she served notable clients such as Goldman Sachs, JP Morgan, Bain Capital, and Prudential. Her expertise spans diverse industries, including technology, life sciences, real estate, and energy. Mihalova holds a Bachelor's degree in Economics and Social Sciences from the University of Geneva, an MBA in Investment Management from Pace University and a Master's degree in International Relations from the University of Geneva. She is also fluent in seven languages, including French, Spanish, and Italian.

Ligo Partners, based in Miami, is Alec Andronikov's single-family office that specializes in co-investing with like-minded investors in disruptive technology-focused opportunities. Their global platform boasts co-investments with over 2,400 domestic and international family offices and qualified investors, collectively representing a net worth of roughly \$220 billion. Ligo Partners focuses on non-traditional, market-uncorrelated technology investments and emphasizes investments led by top venture capitalists or members of the Ligo family office community to maintain a diligent and focused strategy.

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Suna Said

Nima Capital [↗](#)

Founder & Chief Executive Officer

Location

New York, NY

Wealth Creator

Suna Said

Year Founded

2013

ESG Investor



Bio

Education



University of California, Los Angeles



Columbia University

Suna Said is the Founder and CEO of Nima Capital, a New York-based single-family office established in 2013 for the purpose of managing Said's wealth. Prior to founding Nima Capital, she held executive roles at multi-billion dollar international firm, Unifund, Inc.

Said is actively involved in charitable organizations, serving on the boards of Girls Inc., the Chopra Foundation, Pure Edge, Inc., and the Woodrow Wilson National Fellowship Foundation. She is also the Founder of the Suna Said Foundation, an organization using blockchain technology to support young girls globally. She holds an undergraduate degree from the University of California, Los Angeles, and an MBA from Columbia Business School.

Nima Capital provides a range of family office services for Suna Said and her private and public equity investing platforms. These services include asset management, generational planning, estate planning, portfolio construction, and philanthropic planning. The firm has a versatile investment approach, targeting different capital structures, growth stages, and industries, and Said's extensive background in global investment management and social impact empowers her to leverage her network of investment partners, industry leaders, and entrepreneurs, driving success for Nima Capital. Established with the goal of managing and growing Said's wealth, Nima Capital applies its expertise to support Said's investment strategies.

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Tina Schockling

Blue Spruce Capital [↗](#)
Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Broomfield, CO	Michael Smith	Oil & Gas	2005

Bio

Education



University of Texas

Tina Schockling began her career as an Analyst at Houlihan Lokey and later served as a Global Transaction Services Analyst at KPMG. From 1999 to 2016, Tina served as Managing Director and Director of Research at Sentinel Trust, and in 2016, she was appointed as Chief Investment Officer at Blue Spruce Capital, a single-family office based in Broomfield, Colorado. With over 25 years in the financial industry, Tina brings a wealth of experience and strong leadership to her role at Blue Spruce, overseeing all investment activities of the firm and driving its success.

Blue Spruce Capital was established in 2005, leveraging the wealth and expertise of Michael Smith, who built his fortune through his successful career in the energy industry. After founding Basin Exploration Inc., a liquid natural gas exploration company, Smith went on to lead Freeport LNG as CEO and chairman of the board, driving significant growth and achieving a valuation of over \$3.5 billion by 2020.

The Smith family's philanthropic endeavors have made a positive impact on various organizations, including their generous donation of \$5 million towards the construction of a laboratory at National Jewish Health in Denver, Colorado. They are also actively involved in The Women of Tomorrow, Baypoint Schools, and the Children's Developmental Center in New York, NY. With a wide range of investments, Blue Spruce Capital operates as a strategic and forward-thinking family office, aiming to capitalize on diverse opportunities for long-term success.

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Katie Sproul

Halstatt Partnership [↗](#)

Chief Executive Officer

Location

Naples, FL

Wealth Creator

Sproul Family

Year Founded

1911

ESG Investor



Bio

Education



Cornell University



Yale University

Katie Sproul is a successful business executive with a strong background in real estate and principal investments. As the Chief Executive Officer of Halstatt, she plays a pivotal role in overseeing all operations of the firm. With over 20 years of experience, Sproul helped found Halstatt and has spearheaded significant projects such as Grey Oaks and LaPlaya Beach and Golf Resort. Prior to her role at Halstatt, she served as co-President of Barron Collier Companies.

Sproul is a graduate of Cornell University and holds an MBA from Yale. Her extensive experience and leadership roles in the industry have positioned her as a respected figure in the industry, and she is actively involved in the community, serving as Past Chair of the Greater Naples Chamber of Commerce, Leadership Collier Foundation, and the Junior Achievement Hall of Fame. Additionally, Sproul is a Board Member of Audubon of Florida.

Halstatt is a renowned capital partner with a rich history of over 100 years in investing and developing real estate throughout Florida. The firm's extensive network of relationships and expertise across various asset classes has made it a go-to partner in the industry. Halstatt embraces an ethos of honesty, integrity, community engagement, and entrepreneurial spirit. They believe in the importance of adopting environmental, social, and governance (ESG) principles and seek to align with partners who share a similar vision. As the CEO, Katie Sproul emphasizes the value of diversity and inclusivity within the organization in order to highlight the firm's core values and foster better investment outcomes.

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Lynn Tilton

Patriarch Partners [↗](#)

Founder & Chief Executive Officer

Location

New York, NY

Wealth Creator

Tilton Family

Wealth Origin

Financial Services

ESG Investor



Bio

Education



Yale University



Columbia University

Lynn Tilton is an accomplished business leader and the Founder and CEO of Patriarch Partners LLC, a family office and private investment firm. With a mission to rebuild America's economy, Tilton has successfully restructured over 240 companies, collectively generating more than \$100 billion in revenue and preserving 700,000 jobs. Patriarch Partners specializes in revitalizing undervalued iconic American brands, employing strategic capital and expertise to restore value and create employment opportunities across the globe.

Tilton's remarkable leadership extends to her role as CEO of Stila Cosmetics and her involvement with other renowned companies such as Dura Automotive. Her contributions have earned her recognition as one of Automotive News' 100 Leading Women in the industry and the Entrepreneur of the Year award from the Living Legends of Aviation. Tilton's dedication to empowering women and supporting women-owned businesses has been honored with prestigious awards, including the Luminary Award from Womensphere and the ITA Achievement Award from the Intercollegiate Tennis Association. She is celebrated for her commitment to making a positive impact on the global business landscape.

Tilton holds a BA from Yale and an MBA from Columbia, and her extensive experience in finance and leadership roles at prominent institutions like Morgan Stanley and Goldman Sachs has contributed to her exceptional business acumen. Tilton's visionary approach and dedication continue to shape the success of Patriarch Partners and inspire others in the realm of entrepreneurship.

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Wendy Wing

Mantucket Capital [↗](#)

President

Location

Greenwood Village, CO

Wealth Creator

Kenneth Tuchman

Wealth Origin

Technology

ESG Investor



Bio

Education



University of Denver

Wendy Wing brings more than two decades of experience in the industry to her role as President of Mantucket Capital, managing assets and providing valuable services in accounting, tax and estate planning, as well as the management and execution of financial and legal transactions. Prior to her tenure at Mantucket, Wendy worked as an auditor at Arthur Andersen & Co and served as a Managing Partner at Wittkop and Wing.

Beyond her professional achievements, Wendy has actively contributed to the business community. She served on the Board of Advisors for the University of Denver Daniels College of Business and has been an Alumni Mentor for Delta Gamma. Wendy holds a B.S. in Business Administration, as well as a B.S. and Master's degree in Accounting from the University of Denver.

Founded in 2007, Mantucket Capital is the single-family office of Kenneth Tuchman, a renowned entrepreneur and the founder and CEO of TTEC, a global leader in digital customer experience technology and services. With over 40 years of experience in the industry, Tuchman has built TTEC into a prominent company with a strong emphasis on humanizing the customer experience. Committed to making a positive impact, Kenneth and his wife Debra established the Tuchman Family Foundation in 1997 to support education, medical research, environmental sustainability, community well-being, and social change initiatives. Wing and the Mantucket Capital team continue to drive successful investment strategies on behalf of the Tuchman family.

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Marie Young


Bayshore Global Management

Chief Investment Officer

Location	Wealth Creator	Wealth Origin	Year Founded
Los Altos, CA	Sergey Brin	Technology	2006

Bio

Education

 Northwestern University

Marie Young is a seasoned finance professional currently serving as the deputy chief investment officer at Bayshore Global Management. With an impressive background in investment and wealth management, Young has held key positions within the organization during her 12-year tenure at the firm, including director of investments and portfolio manager.

Prior to joining Bayshore, she gained valuable industry experience as a financial analyst at Goldman Sachs. Armed with a B.A. in economics from Northwestern University and a CFA designation, Young brings a strong foundation in financial knowledge and strategic decision-making to her role.

Bayshore Global Management, headquartered in Palo Alto, CA, is a prestigious single-family office entrusted with the wealth management of Sergey Brin, the co-founder of Google. With an established reputation in the industry, Bayshore Global Management employs a diverse team of professionals, including former bankers and philanthropy experts, to oversee the multi-billion-dollar fortune of Sergey Brin and his family. The firm engages in global investment strategies, spanning public and private equity, real estate, technology, fixed-income, and more. With a commitment to portfolio diversity and a discreet approach, Bayshore Global Management maintains a low internet profile, ensuring the utmost privacy for its clients.

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Conclusion

It is an honor for us to be able to present the data contained in this report and to highlight these 25 extraordinary women and their achievements in propelling the growth of their respective firms as well as the greater financial ecosystem.

As we look to the future and consider the ongoing and rapid evolution of the single family office landscape, we are confident that women such as these will continue to drive success for their firms and make a substantial impact as strong and influential decision-makers within the industry.



Each of these women has achieved notable success, serving as a source of guidance and carving out the pathway for increased female representation in the family office space.

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About FINTRX

FINTRX is a leading family office & registered investment advisor (RIA) data intelligence solution that provides comprehensive data on **3,700+** family offices, **20,000** family office contacts, **40,000** RIAs and **850,000** registered reps. Our platform combines data, analytics and intuitive software to help clients identify investment opportunities, connect with investors and stay informed on industry developments. FINTRX is designed to be user-friendly, with a variety of features including custom list building, news alerts and notifications, real-time updates and customizable reporting options.

At FINTRX, we leverage advanced AI technology to provide accurate information on family offices and RIAs worldwide. Our data is powered by millions of sources, both public and private, which are constantly updated and verified by our **70+** person research team. This ensures you have access to the most relevant and timely information available in the market.

Asset-raising professionals leverage FINTRX to gain insights into investment trends and preferences, find new investment opportunities and pinpoint prospective partners and clients. Our team is committed to delivering unparalleled support and guidance, empowering all users with the essential tools and resources required to succeed in the realm of private wealth.

