



# FAMILY OFFICE ALLOCATOR

2022

First Edition

Private Equity Professional and [PrivateEquityCareer.com](https://www.PrivateEquityCareer.com)

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**Private Equity**  
**PROFESSIONAL**

Private Equity Career News

# FAMILY OFFICE ALLOCATOR

FIRST EDITION

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# SINGLE FAMILY OFFICES



## 10 Branch

18420 Old River Landing  
Lake Oswego, Oregon 97034  
[www.10branch.com](http://www.10branch.com)

### INVESTMENT PROFESSIONALS

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**Managing Partner**  
[miles@10branch.com](mailto:miles@10branch.com)

**Jay Haladay,**  
**Partner**  
[jay@10branch.com](mailto:jay@10branch.com)  
Phone: 503-970-3447

### DESCRIPTION

10 Branch invests in Oregon-based technology companies with potential for growth. The Firm makes early-stage investments to maximize revenue growth and operational expansion. 10 Branch assist with sales, marketing, product management, board management, company culture, fundraising and mid-long term strategic planning.

**Founded:** 2015

**Founding Matriarch/Patriarch:**  
Jay Haladay

### FUND COMMITMENTS

No known program at this time

### DIRECT INVESTMENTS

#### Strategies Sought

- ▶ Venture Capital
- ▶ Growth Equity

#### Industries Sought

- ▶ Technology
- ▶ Real Estate

#### Global Regions Sought

- ▶ North America
- ▶ Pacific Northwest

## 10100 Fund

[www.10100fund.com](http://www.10100fund.com)

### INVESTMENT PROFESSIONALS

**Travis Kalanick,**  
**Founder**  
[travis@10100fund.com](mailto:travis@10100fund.com)

### DESCRIPTION

10100 Fund is the family office and venture fund of Uber co-founder Travis Kalanick. The fund focuses investments on real estate, e-commerce and emerging technology companies. Previous investments include Luminous Computing, Kargo Technologies, Opendoor and City Storage Systems.

**Founded:** 2018

**Founding Matriarch/Patriarch:**  
Travis Kalanick

### FUND COMMITMENTS

No known program at this time

### DIRECT INVESTMENTS

#### Strategies Sought

- ▶ Venture Capital
- ▶ Real Estate

**Lead, Co-invest, or Both:** Both

#### Industries Sought

- ▶ Technology
- ▶ Real Estate
- ▶ E-commerce

## 2M Companies

4441 Buena Vista  
Dallas, Texas 75205  
[www.2m.com](http://www.2m.com)

### INVESTMENT PROFESSIONALS

**Morton Meyerson,**  
**Chief Executive Officer and Chairman**  
[morton.meyerson@2m.com](mailto:morton.meyerson@2m.com)  
Dallas, Texas

- ▶ Financial Services
- ▶ Healthcare
- ▶ Media and Entertainment
- ▶ Technology
- ▶ Hospitality
- ▶ Restaurants

## Alfred I. duPont Charitable Trust

510 Alfred duPont Place  
Jacksonville, Florida 32202  
Phone: 904-394-9800  
[www.alfrediduponttrust.org](http://www.alfrediduponttrust.org)

## INVESTMENT PROFESSIONALS

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**Managing Director, Private Markets**  
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Jacksonville, Florida

## DESCRIPTION

The Alfred I. DuPont Trust was created after the death of Alfred I. duPont in 1935. All of the trust's investments support its sole charitable beneficiary, the Nemours Foundation. According to its website, the trust operates similar to traditional value investing strategies, looking for investments where assets are undervalued. The trust does commit to growth investing as well, including substantial venture capital investments.

**Founded:** 1935

**Assets Under Management:** \$4.6 billion

**Founding Matriarch/Patriarch:**  
Alfred I. duPont

## FUND COMMITMENTS

### Strategies Sought

- ▶ Venture Capital
- ▶ Growth Equity

### Preferred Fund Size

- ▶ Less than \$100 million
- ▶ \$100 million to \$500 million
- ▶ \$500 million to \$1 billion
- ▶ \$1 billion to \$5 billion

## DIRECT INVESTMENTS

### Strategies Sought

- ▶ Venture Capital
- ▶ Growth Equity

## Alpheus Capital

8 Kensington Park Road  
London, United Kingdom W11 3BU  
Phone: +44-20-3657-2248  
[www.alpheuscapital.com](http://www.alpheuscapital.com)

## INVESTMENT PROFESSIONALS

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**Rob Morrish,**  
**Investment Director**  
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## DESCRIPTION

Alpheus Capital manages the alternative asset program for a European single-family office with a focus on investments in the UK, Western Europe, USA/Canada, Asia, and Australasia. The firm makes growth equity direct co-investments with private equity sponsors and managers primarily in the middle-market. Alpheus commits to a wide range of funds with investments of 10-20 million euros and direct co-investments of 3-10 million euros in companies with up to 100 million euros in enterprise value.

**Founded:** 2003

## FUND COMMITMENTS

### Strategies Sought

- ▶ Growth Equity
- ▶ Secondary Funds

### Global Regions Sought

- ▶ North America
- ▶ Europe
- ▶ Asia & Australia

### Preferred Fund Size

- ▶ Less than \$100 million
- ▶ \$100 million to \$500 million

## DIRECT INVESTMENTS

### Strategies Sought

- ▶ Growth Equity
- ▶ Secondaries

**Lead, Co-invest, or Both:** Co-invest in Deals

### Global Regions Sought

- ▶ North America
- ▶ Europe
- ▶ Asia & Australia

## Alta Advisers

Elsley House, 24-30 Great Titchfield Street  
London, United Kingdom W1W 8BF  
Phone: +44-207-590-5010

## INVESTMENT PROFESSIONALS

**Bob Lutgen,**  
**Director of Investments**  
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**Christopher Fountain,**  
**Investment Analyst**  
[chris.fountain@altaadvisers.co.uk](mailto:chris.fountain@altaadvisers.co.uk)

## DESCRIPTION

Alta Advisers is a single-family office investing across various private equity, venture capital and real estate strategies, primarily through fund commitments.

## FUND COMMITMENTS

### Strategies Sought

- ▶ Buyouts
- ▶ Venture Capital
- ▶ Growth Equity
- ▶ Real Estate
- ▶ Turnarounds/Distressed Debt

### Global Regions Sought

- ▶ North America
- ▶ Latin America and South America
- ▶ Europe
- ▶ Asia & Australia
- ▶ Africa/Middle East

## DIRECT INVESTMENTS

No known program at this time

## Alta Companies

7 Times Square  
New York, New York 10036  
Phone: 917-400-1000  
[www.altacap.com](http://www.altacap.com)

## INVESTMENT PROFESSIONALS

**Paul Kang,**  
**President and Chief Investment Officer**  
Phone: 212-828-5820

## DESCRIPTION

Alta Companies is led by Paul Kang and invests with an endowment-style philosophy across a wide range of both fund commitments and direct investments.

**Assets Under Management:** \$500 million

## FUND COMMITMENTS

### Strategies Sought

- ▶ Buyouts
- ▶ Growth Equity
- ▶ Mezzanine
- ▶ Private Debt
- ▶ Real Estate
- ▶ Secondary Funds
- ▶ Hedge Funds
- ▶ Turnarounds/Distressed Debt

### Global Regions Sought

- ▶ North America
- ▶ Europe



# MULTI-FAMILY OFFICES



## 1919 Investment Counsel

One South Street, Suite 2500  
Baltimore, Maryland 21202  
Phone: 410-454-3154  
[www.1919ic.com](http://www.1919ic.com)

## BRANCH OFFICES

787 Seventh Avenue, 12th Floor  
New York, New York 10019  
Phone: 212-554-7100

49 Stevenson Street, Suite 1075  
San Francisco, California 94105  
Phone: 800-675-0063

2700 Post Oak Boulevard, 21st Floor  
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Director and Portfolio Manager  
[cking@1919ic.com](mailto:cking@1919ic.com)  
Baltimore, Maryland

## DESCRIPTION

1919 Investment Counsel serves high net worth individuals, families, endowments, foundations and other investors,

providing comprehensive investment management services as well as financial planning and family office services. The firm provides family clients access to a variety of investment strategies including equities and fixed income, and within alternatives offers access to hedge funds, real estate, commodities, distressed debt and private equity (growth capital, leveraged buyout and venture capital). All alternative investments beyond the firm's core capabilities are made directly using external managers. As of 10/12/21 1919 IC managed \$17.43 billion in discretionary assets and \$129.1 million in non-discretionary assets across 6,503 total accounts.

**Founded:** 1919

**Employees:** 68

**Assets Under Management:** \$17.6 billion  
(discretionary and non-discretionary)

**Services Offered**

- ▶ Direct/Co-Investments

**FUND COMMITMENTS**

- ▶ Hedge Funds

**DIRECT INVESTMENTS****Strategies Sought**

- ▶ Buyouts
- ▶ Venture Capital
- ▶ Growth Equity
- ▶ Private Debt
- ▶ Real Estate
- ▶ Turnarounds/Distressed Debt
- ▶ Commodities

**Abacus Wealth Partners**

429 Santa Monica Boulevard, Suite 500  
Santa Monica, California 90401  
Phone: 888-422-2287  
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**BRANCH OFFICES**

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Philadelphia, Pennsylvania 19103  
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Sebasopol, California 95472  
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Santa Monica, California

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Partner and Chief Financial Officer  
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Santa Monica, California

**DESCRIPTION**

Abacus Wealth Partners serves individuals and families, providing financial planning, consulting, investment management, estate planning and retirement planning services. For some clients, the firm allows access to private investments, but it is not the firm's primary investment strategy. Abacus typically recommends a mix of public mutual funds and private institutional passive funds to its clients. As of 3/31/21 the firm managed \$3.5 billion of discretionary assets and \$236.8 million of non-discretionary assets across 6,044 total accounts.

**Founded:** 1988

**Employees:** 66

**Assets Under Management:**  
\$3.8 billion (discretionary and non-discretionary)

**Services Offered**

- ▶ Direct/Co-Investments
- ▶ Consulting

**FUND COMMITMENTS****Strategies Sought**

- ▶ Buyouts
- ▶ Hedge Funds

**DIRECT INVESTMENTS****Strategies Sought**

- ▶ Buyouts
- ▶ Commodities

**Aberdeen Standard Investments**

1 George Street  
Edinburgh, Great Britain  
[www.aberdeenstandard.com](http://www.aberdeenstandard.com)

**BRANCH OFFICES**

1 Bread Street  
London, Great Britain EC4M 9

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Philadelphia, Pennsylvania 19103

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Boston, Massachusetts

**DESCRIPTION**

Aberdeen Standard Investments is a global asset manager serving institutional investors, governments, financial institutions, private investors and multiple types of funds. The firm's U.S. business currently has roughly \$32 billion in AUM on a discretionary basis and \$4.8 billion on a non-discretionary basis. The firm and its subsidiaries offer clients access to a wide variety of investment strategies, within

alternatives investing in private equity, venture capital, hedge funds, real assets and directly in infrastructure, as well as funds-of-funds of all aforementioned asset classes.

**Founded:** 2017

**Employees:** 352

**Assets Under Management:**  
\$36.8 billion (discretionary and non-discretionary)

**Alternatives AUM:** \$25.7 billion

**Services Offered**

- ▶ Funds of Funds
- ▶ Direct/Co-Investments

**FUND COMMITMENTS****Strategies Sought**

- ▶ Buyouts
- ▶ Venture Capital
- ▶ Growth Equity
- ▶ Real Estate
- ▶ Hedge Funds
- ▶ Infrastructure

**DIRECT INVESTMENTS****Strategies Sought**

- ▶ Real Estate
- ▶ Infrastructure

**Lead, Co-invest, or Both:** Both

**Industries Sought**

- ▶ Real Estate
- ▶ Infrastructure

**Alberleen Group, The**

350 Fifth Avenue, Suite 5310  
New York, New York 10118  
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**Kilty Mahoney,**  
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**Marcia Nelson,**  
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Phone: 212-220-2716

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