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Overview

Joel is a Senior Partner with Ernst & Young's Global Hedge Fund Practice. He provides business advice to investment partnerships, broker-dealers and investment advisers covering organization structuring, accounting, tax, and technology issues. In the beginning stages of structuring new entities, he works with management to determine the best approaches they should take regarding personnel, compensation arrangements, back office support, attorneys, and prime brokers. He assists in the creation of hedge fund products that are being offered by large institutions including the development of due diligence procedures, marketing, distribution strategies, technology requirements, and creative compensation programs for distribution sales force and management teams.

Joel also assists in the development of optimal incentive compensation arrangements for hedge funds, investment managers and broker-dealers. He has conducted a number of advisory projects for multi billion-dollar hedge funds concerning leadership, succession planning, systems security, and future technology design.

Client List

Joel has worked with such clients as American Express, JP Morgan, Liberty and UBS Paine Webber.

Education/Qualifications

Joel is a frequent lecturer and speaker at conferences around the world on securities, investment partnerships and tax issues pertaining to the financial services industry. Further, he is the contributing author to a number of articles and industry publications:

- *Security Markets Around the World*, 1988
- *Hedge Funds – A Guide for Institutional Investors*, 1995
- *Evaluating and Implementing Hedge Fund Strategies*, 1999
- *Private Equity and Venture Capital*, 2000
- *Hedge Funds Law & Regulation*, 2000. The first comprehensive survey of the many legal issues that affect the hedge fund industry in the many jurisdictions worldwide.
- *Funds of Hedge Funds – For Professional Investors & Managers*, 2002

Joel obtained a BS Accounting from Long Island University, Brooklyn Campus in 1968. He also attended graduate courses in tax and finance in Pace University, NY, NY.