

# Digital Evolution Institute Explores the Evolution of Deal Sourcing by Exceptional Family Offices and Investors

*Digital Evolution Institute is a global think tank at the intersection of technology, investment, entrepreneurship and creative endeavors*

NEW YORK, NY, UNITED STATES, April 29, 2024 /EINPresswire.com/ -- [Digital Evolution Institute](#) welcomed forward-thinking family offices, impact investors, technologists and philanthropists to BakerHostetler's Rockefeller Center office in February 2024. Thought leaders gathered to discuss how technology is accelerating the adoption of alternative marketplaces and injecting efficiency into deal sourcing. "This is one of the hottest areas in FinTech right now," said Julia Valentine, co-founder of the Digital Evolution Institute.



Tracy McWilliams Presenting JaspY at the Digital Evolution Institute

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Alternative Marketplaces are the new wave of digital evolution helping investors source deals more efficiently.”

*Julia Valentine, Co-founder  
Digital Evolution Institute*

“I’ve been investing for years and built an AI driven platform that makes investing more efficient, analyzing deal flow easier, and brings connectivity to founders and investors alike,” said John Sharp, Founder of Hatcher+ FFAST. Alex Esparza, MD with Freedom Capital Markets Investment Banking, discussed how the public and private capital markets have changed over the last few years and how her team uses technology to track capital formation and find new opportunities.

Tracy McWilliams, co-founder of the Digital Evolution Institute, delivered a keynote on the growing importance of technology in selecting, managing and tracking private company investments. As a former Investment Banker and a venture investor, Tracy McWilliams was in the perfect position to launch the leading technology platform called [JaspY](#)—one place to store deals

that are sourced in many ways, including alternative marketplaces. "Democratization is happening now at an accelerated pace with more data available on private investments", said Tracy McWilliams, "Technology is opening access to alternative investments to anyone from students to angel investors to sophisticated family offices."

"My biggest takeaway is that no two investors are alike in their investment mandates, and alternative marketplaces become a necessary tool to provide access in a turbo-charged way," added Danielle Patterson, CEO of Family Office List. "We get to speak to over 4700 family offices globally about their investment objectives. This insight is invaluable to us, but it only becomes actionable at scale through the vehicle of alternative marketplaces."

Linda Isabel Rincón, Director of Experiences at The ImPact that was launched by the Ford, Pritzker, Rockefeller families, commented, "Families and family offices are becoming more sophisticated at integrating their values and impact visions into capital deployment, helping create a significant movement in the industry, where impact considerations are a common component of enhanced investment practice. A significant hurdle is sourcing high-quality deals that prioritize impact management and fit values alignment mandates, a place where technology might play a role."

"Venture capital comes in many forms, including fueling social impact. Philanthropic organizations, like Robin Hood, are excellent at sourcing high-quality deals, especially for the next generation of social entrepreneurs who are keen to utilize market-driven principles to forge longer term changes for good. This is an exciting frontier, and the work of the Digital Evolution Institute will add tremendous value for investors," said Peter Borish, founding board member of



Tahji Beth LaComb Wolpert, CEO of YogaBeesAreBeautiful.com delivers her keynote at the Digital Evolution Institute



John Sharp, Founder of Hatcher+ FAAS (Fund as a Service Technology) at the Digital Evolution Institute

Robin Hood and Math for America.

Rich Nuzum, CFA, Executive Director, Investments and Global Chief Investment Strategist at Mercer, a global consulting firm, said, “I greatly enjoyed the discussion generated by my keynote presentation on Deal Sourcing in ClimateTech. This gave me a chance to showcase Mercer’s Catalytic Investment Exchange, a digital platform that helps direct investors perform initial due diligence on infrastructure projects, venture capital and other early-stage private equity opportunities. The diversity of experience, activities and areas of focus across conference participants was amazing—and the one commonality I observed was a passionate focus on capturing the benefits of innovation”.

Michael Beckerman, CEO of CREtech, led a conversation of investing in ClimateTech in the build world. “Given that the Built World represents 40% of total carbon emissions globally, a fast-growing climate tech sector is quickly being formed at scale to decarbonize buildings and cities around the world. Thanks to the Digital Evolution Institute, this recent event was a terrific venue for several of the leading climate-focused venture investors to discuss their specific investment strategies and shed some light on the market’s enormous potential,” Beckerman stated.

Justin Dirico, Principal at OTC Direct, said, “Investments in renewable power are crucial for transitioning towards a more sustainable future. It’s great that initiatives like the Digital Evolution Institute are opening up new avenues for individuals and family offices to participate in these projects. OTC Direct combines digital innovation and risk management to accelerate the growth of renewable energy investments and contribute to combating climate change”. “Cities also look to create ecosystems for ClimateTech development,” added Nicola Demko, Head of Business Development with Venture Miami, “and Miami is building up to become a major player in ClimateTech.”

Margaret Butler, Partner at BakerHostetler, the law firm that graciously hosted the event, delivered a keynote on applying existing securities laws to new technologies. “Supporting the creation and operation of alternative marketplaces that comply with U.S. securities laws presents a once-in-a-generation challenge for attorneys experienced with broker-dealer and alternative trading system registration and compliance and well-positioned to engage with emerging SEC rules regarding the use of AI. I am thrilled to practice law at the intersection of finance and technology at this unique moment,” said Margaret.

David Teten, Venture Partner, Coolwater Capital and Founder, Versatile VC delivered a keynote on Who Will Disrupt Investment Management, and How. Prominent Family Offices, including Yale Fishman, Wendy Diamond, Ed Luzine, Kevin Ernst, Kamil Homsy, Adi Divgi discussed how family offices manage deal flow.

Digital Evolution Institute has pioneered many thought leadership trends. One of the most beloved of its innovations is creating connectivity beyond business, with our body, mind, emotions, spirit and relationships. Tahji LaComb Wolpert, CEO of Yoga Bees Are Beautiful and a

renowned Yoga teacher, spoke about the future of humans, networks and machines, and went beyond it with a full yoga and breathing break that was much appreciated by the distinguished audience. "A healthy mind in a healthy body, that's the power of Yoga!" noted Olga Gruscinska, MD, a conference attendee.

"Move your body, open your mind, relax and see how it affects every aspect of your life!" Tahji said. "It is inspiring to welcome our community to this well-rounded experience", noted Brinkley Skye, Board Member of Digital Evolution Institute.

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