8TH ANNUAL
EMERGING LEADERS AWARDS
NEW YORK
SEPTEMBER 19, 2017
To you it’s a smartphone.
To her, a new beginning.

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Welcome to the 8th Annual Emerging Leaders Awards Gala.

Since 1998, The M&A Advisor has been presenting, recognizing the achievement of and facilitating connections between the world’s leading mergers and acquisitions, financing and turnaround professionals. The Annual M&A Advisor Emerging Leaders Awards were created in 2010 to recognize and celebrate the achievements of the M&A, Financing and Turnaround professionals who had reached a significant level of success in the industry while still under the age of 40.

In 2016, the Emerging Leaders program expanded to the UK/Europe and today we count over 1000 alumni who are leading the corporate finance industry in North America and the EMEA region. And we encourage and support the connection, through our Summits and Forums in the United States and Europe, between the established and emerging leaders in finance, corporate, media, policy making, academic and social good.

Tonight, we are gathered to introduce the 2017 Emerging Leader Award winners to the business community and celebrate their achievements. They have been chosen for their accomplishments and expertise, from a pool of prominent nominees, by an independent judging panel of nineteen distinguished business leaders. And this year our judges reported that they were challenged to make their selections from such an accomplished group of candidates. We are truly inspired by their accomplishments and wish continued success to this unique group of professionals.

The M&A Advisor’s mission is to connect, present and recognize the premier performers in our industry. On behalf of our alliance partners, sponsors and The M&A Advisor Team, it is our pleasure to formally welcome you to the Gala this evening.
REVITALIZING THE LOWER MIDDLE-MARKET

INVESTMENT CRITERIA

Sales: $20 - $100MM

EBITDA: $2 - $20MM

Industries: Low-tech manufacturing, distribution and service companies, with a particular focus on the Great Lakes Region

Management: Founder or family-owned

Add-ons: No minimums

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The M&A Advisor is proud and thankful to have the support of the 8th Annual Emerging Leaders Awards Alliances and Sponsors:

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Awards Gala Hosts

Sonali Basak is a Broadcast and Business and Economics Reporter at Bloomberg News. She writes about AIG, property-casualty insurers, Bermuda-based reinsurers and independent investment banks such as Lazard and Evercore. She was trained at Northwestern's Medill School of Journalism in business and broadcast reporting. She is also a former startup and tech reporter. She wrote for publications including MarketWatch, Chicago Tribune’s Blue Sky Initiative, Kellogg School of Management, United Press International, McClatchy, Techonomy, Techli and Tech Cocktail.

David A. Fergusson is the President and Co-CEO of The M&A Advisor – the world’s premier leadership organization of mergers & acquisition, turnaround and financing professionals. Mr. Fergusson leads the M&A Advisor’s operations, from their offices in New York and London, managing the “think tank” publishing, media, forum and consulting services for the firm’s constituency of over 350,000 finance industry professionals around the world. As the host of The M&A Advisor’s exclusive “thought leadership” summits and editor of the “market intelligence” reporting, Mr. Fergusson engages regularly with leaders in the finance industry, media, and government. He is a respected speaker on the subjects of financial services, technology and leadership, a frequent contributor to media organizations globally and the editor of “The Best Practices of The Best Dealmakers” series with a readership of more than 500,000 in over 60 countries. Mr. Fergusson is the President-Elect of HOBY (Hugh O’Brien Youth Leadership) and is an advisor to several companies and social innovation initiatives.

Agenda

6:30 – 7:30 pm
AWARDS GALA RECEPTION
Presented By  RAYMOND JAMES & CONWAY MACKENZIE

7:30 – 10:00 pm
AWARDS GALA DINNER
Hosted By
Sonali Basak | Reporter, Bloomberg News

10:00 – 11:30 pm
THE CLOSING PARTY
Presented By  MADISON STREET CAPITAL

#2017ELNY
Roger Aguinaldo is the Founder and Co-CEO of The M&A Advisor, the preeminent global organization that presents, connects and recognizes achievement of the top performers in the M&A, financing and turnaround industries. A leading authority on mergers and acquisitions and finance, Mr. Aguinaldo has consummated over $5 billion of M&A transactions at Merrill Lynch & Co., at a boutique investment banking firm and at a private investment firm, over the past 27 years. He has written over 800 articles in the past 17 years through The M&A Advisor publications, and is a frequent guest on finance television shows, such as Wall St. Week, Fox, CNN, CNBC and Bloomberg. He is a co-contributor of the newly-published series, “The Best Practices of the Best Dealmakers.” Mr. Aguinaldo sits on the Investment Committee of the Diocese of Brooklyn. He received a B.S. from Carnegie Mellon University and an M.B.A. from New York University.

AWARD JUDGING

Earlier this year, The M&A Advisor issued a Call for Nominations to all M&A, Financing and Turnaround professionals who were under the age of 40 before January 1, 2017 to be considered for the 8th Annual Emerging Leaders Awards.

A panel of nineteen independent judges, chosen for their industry expertise and individual accomplishments, evaluated the qualified nominees.

THE MEMBERS OF THE 2017 JUDGING PANEL WERE:
Dan Alamariu | Executive Director, Political and Country Risk, UBS
Reba Beeson | Partner, SRD Legal Group
Ben Boissevain | Managing Partner, Bois Capital, LLC
Joe Durnford | Senior Managing Director & CEO, JD Ford & Company
Ian Fay | Partner, Entoro Capital, LLC
Michael Fein | Senior Managing Director, Okapi Partners
Alexander Felman | Managing Director, Felman Family Office
Rubén Ferrer | Partner, GOMEZ-ACEBO & POMBO
Jun Ge | Director, IIAM
Barney Given | Partner, Loeb & Loeb LLP
Steven Klemencic | Director, Forensic Services, PwC
John Lieberman | Managing Director, Perelson Weiner LLP
Anthony Mak | Director, Hong Kong Trade Development Council
Henry Ngan | Founder and Managing Partner, HHN Capital LLC
Joseph O’Donnell | Vice President, Investigative Management Group
Joshua Rockoff | Head of Omnichannel, Sears Holding Corp.
Phil Taylor | Partner, Sidley Austin LLP
Boris Tsimerinov | Managing Director, Semper8 Capital
Shasha Yan | Relationship Manager & Underwriter, China Merchants Bank

The candidates were judged, in the security of a Merrill Corporation virtual data room, on the following four criteria:
• Career accomplishments
• Professional expertise
• Community/charitable contributions
• Unique individual circumstances

On June 29th, The M&A Advisor proudly announced the 2017 Winners who are being celebrated here tonight.
8TH ANNUAL EMERGING LEADERS AWARD WINNERS
Fahad AlDehais is the Managing Partner of the Saudi Arabia practice and offices at Mohammed AlDhabaan & Partners in association with Eversheds Sutherland (International) LLP. Fahad is highly experienced in capital market transactions, corporate and commercial transactions, and sophisticated foreign investments. Fahad is also a practicing litigator. Fahad has also extensive experience in banking and insurance on which he taught numerous courses with SAMA’s Institute of Banking and Finance early in his practice. Fahad has and continues to be active on private equity, funds, mergers and acquisitions and multiple IPOs, underwriters counsel and to several IPO readiness exercises worth up to SAR 2.5 billion in total offerings. Fahad has advised and continues to advise several investment banks, private equity firms and family offices.

Derek Alexander is Deputy General Counsel of Stifel Financial Corporation, and Adjunct Professor of Law at Cardozo School of Law. Derek heads legal support of Stifel’s board of directors and shareholder relations. With nearly a decade of experience in restructuring and bankruptcy law, Derek has found new ways for Stifel’s bankers to win business in restructuring advisory, rooted in Stifel’s Miller Buckfire restructuring IB franchise and extended into its financial institutions and industry IB franchises: Keefe, Bruyette & Woods and Stifel Nicolaus & Co. Derek strives to give sound legal counsel not only to defend against loss, but also as a foundation upon which the firm can take the offence and gain new opportunities. He graduated from Harvard Law School in 2009, where he was Editor of the Harvard Law Review.

Angela M. Allen is a Partner in Jenner & Block’s Restructuring and Bankruptcy Practice. Angela focuses on complex bankruptcy litigation and corporate reorganization. Angela represents clients in complex bankruptcy and corporate restructuring matters, both in and out of court. She regularly counsels corporate clients in financially distressed situations and insolvency planning matters, and assists clients in protecting their rights throughout the bankruptcy process. She has extensive experience representing debtors, trustees and creditors in bankruptcy litigation matters. She also has experience in conducting internal investigations. Angela dedicates substantial pro bono time and energy to legal issues involving the military. She serves as director of the Illinois chapter of the Military Spouse JD Network. She is also active in the Chicago chapter of the Turnaround Management Association and currently serves on the Board of Directors.

Ryan Anderson is a Vice President in Allied World’s North American M&A division. Ryan is responsible for underwriting, production and distribution of Transactional Liability Insurance Products, including the Representations and Warranties Insurance product. Since joining Allied World, Ryan has worked on transactions with enterprise values ranging from $20,000,000 to over $1,000,000,000. Prior to joining Allied World, Ryan practiced as a corporate transactional and private equity M&A attorney at Winston & Strawn, LLP in New York. While practicing, Ryan was seconded to the office of Audax Group, a client of both Winston & Strawn LLP and Allied World. Ryan obtained his J.D. from the University of Pennsylvania Law School and a B.A. from the University of Pennsylvania.

Brian Ashin is a Partner in Manatt, Phelps & Phillips’s corporate and finance practice, based in Washington, D.C. Brian represents private equity sponsors, fundless sponsors, financial institutions and private companies in leveraged buyouts, project financings, growth equity investments, mergers and acquisitions, debt financings, leveraged recapitalizations, joint ventures, restructurings and reorganizations, both domestically and internationally, covering many industries, including energy, hospitality, infrastructure, technology, media, FinTech, retail and sports. Brian has taught Renewable Energy Seminar: Policy, Law and Projects as an adjunct professor at Georgetown Law. Prior to joining Manatt, Brian worked in the New York and Washington, D.C., offices of a national law firm, and he is a member of the State Bar of New York and the District of Columbia Bar Association.

Award Winners
Congratulations
to our Managing Partner
- Saudi Arabia,
Fahad AlDehais

... on being named as a
2017 Emerging Leader by
The M&A Advisor

aldehais@aldhabaan-es.com
Vineet Asthana is a Managing Director at Berkery Noyes with 12 years of investment banking and corporate finance experience. He focuses primarily on Telecom, Media and Technology M&A transactions. Vineet has significant experience from leading bulge bracket firms and mid-market boutiques. He is well-versed in transaction structuring, execution and board-level communications, having completed more than 40 transactions totaling over $10 billion. Vineet brings a global perspective having worked in the US, London, Middle East and Asia. Prior to joining Berkery Noyes, Vineet was a founding member at CyndX Advisors. He was formerly a Vice President in the Telecom, Media and Technology investment banking group at Deutsche Bank and Vice President at Citigroup M&A team. Vineet holds a BBA from Franklin & Marshall College and an MBA from University of Chicago Booth School of Business.

Michael Balistreri is a Managing Director in the North America Debt Finance & Restructuring Group at Canaccord Genuity. With over 11 years of investment banking experience, Michael specializes in complex advisory assignments, including financial restructurings, recapitalizations, mergers and acquisitions and financings for clients across all industry lines both in and out of bankruptcy. Through his debtor-side advisory work, Michael has consistently proven his ability to maximize value for his clients and their constituencies under difficult circumstances. He is also a member of his firm’s Fairness Opinion Review Committee. Michael currently serves on the Board of Directors for The Institute for Community Living. He holds the positions of Executive Director, Treasurer and Chairman of the Finance & Investment Committee.

Daniel Ballen is a Portfolio Manager and Senior Vice President for PIMCO. Daniel is a native New Yorker and has spent the past decade executing growth equity and buyout investments in the US and Europe. At PIMCO, Daniel focuses on leading private equity investments in the financial services and financial technology industries, and currently serves as the lead director on the Boards of four of his investments. Prior to joining PIMCO, Daniel was an investment professional focused on sourcing and executing private equity investments for Pine Brook Partners and Bain Capital. Daniel began his career as an analyst within the investment banking division at Bear Stearns, where he was a member of the Financial Institutions Group (FIG) and advised companies on a wide range of M&A and capital raising activities.

Tom Beerle is a Principal at Bertram Capital where he oversees investments in business services and consumer sectors. Tom began his career at Bertram Capital as a summer intern in 2008 and was hired as a Senior Associate in 2009. Tom was promoted to Vice President in 2011 and Principal in early 2015. He currently sits on the board of four Bertram portfolio companies including A1C, ECS Tuning, Spireon, and Trademark Global. Prior to Bertram Capital, Tom worked with Opus Capital where he sought to leverage technology in evaluating investment opportunities across a number of industries. Tom graduated from the University of California at Santa Barbara with a Bachelor of Arts in Business Economics and Psychology, summa cum laude. Tom also earned his MBA from Haas Graduate School of Business from the University of California at Berkeley.

Susan E. Beth is the Chief Operating Officer of NRD Capital. Susan, CFE, is leading the charge to change the way franchise brands grow. Susan is primarily charged with fund management, portfolio company oversight, executive recruitment and deal sourcing. Previously the Vice President and the COO of Super Wash, Inc., Beth is a past member of the Board of Directors of the International Franchise Association (IFA) and is a sought after motivational speaker. She received the IFA’s prestigious Bonny LeVine Award in 2012 and the 2013 Crystal Compass and was featured as one of the “20 to Watch” in the January 2011 issue of Franchise Times and was named by 1851 Franchise Magazine as a “Young One to Watch” in 2016.
CONGRATULATIONS TO

TOM BEERLE

AND ALL OF THE 2017 M&A ADVISOR EMERGING LEADERS AWARD WINNERS

Tom, thank you for being both an outstanding colleague and friend. This award is a deserving recognition of your leadership and contributions as a Principal of the firm.

- THE BERTRAM CAPITAL TEAM

www.bertramcapital.com
Sarah Bowen is the Director of Marketing for Watermill Group. Sarah is responsible for marketing and business development initiatives, managing the deal pipeline, driving firm-focused marketing activities and supporting the marketing of its portfolio companies. She joined Watermill in 2014 and has more than ten years of experience in marketing strategy and content marketing across a variety of industries. Prior to joining Watermill, Sarah held marketing roles at King Fish Media, and in the children's publishing division of Simon & Schuster. Sarah received her M.B.A. from the Tuck School of Business at Dartmouth and her B.A. in Psychology from Bates College.

Michael Brandess is a Partner at Sugar Felsenthal Grais & Hammer. Michael has a wealth of experience representing businesses involved with complex restructurings and liquidations across the country, in industries ranging from energy, real estate, healthcare, construction, agriculture, retail, financial services, telecommunications and restaurant franchises. Michael represents secured lenders both before and during insolvency proceedings. Michael is a member of the firm’s Bankruptcy, Reorganization and Creditor’s Rights and Business Transactions practice groups. Michael received his juris doctorate from the University of Illinois College of Law magna cum laude. Michael received his B.A. in English from the University of Michigan.

Jonathan Breido is a Partner at Crowe Soberman’s Audit & Advisory Group. He is also a key member of the firm’s M&A Transaction Advisory Group. Jonathan came to Crowe Soberman from one of the largest professional services firms and brings with him a wealth of experience. Jonathan caters to his clients’ strategic advisory needs and provides quality results efficiently and cost effectively. Jonathan focuses on helping his clients realize exceptional value through progressive tax planning, delivered seamlessly through a personalized level of service. He says, “It is about more than just an audit.” His service model is to not only meet client expectations, but also exceed them.

Mark Briden is a Director at MorrisAnderson. Mark began his career as a young entrepreneur. He was the co-founder of an e-commerce B2C company and grew it to annual revenues of $16 million. After graduating with two bachelor’s degrees in accounting and BIS at Illinois State University, Mark began his professional career at Corbett, Duncan & Hubly in the Business Consulting Group. Mark joined MorrisAnderson as an Associate Director in 2013, where his primary focus currently consists of managing a wide range of distressed corporate restructurings and crisis management engagements, both in and out of court. Mark was promoted to Director in 2016.

Jeff Brooker is a Partner at McGuireWoods. Jeff focuses his practice on advising private equity funds, venture capital funds and independent sponsors and their respective portfolio companies in connection with mergers and acquisitions, growth equity investments, leveraged buyouts, recapitalizations, management buyouts and secondary transactions. Jeff also provides outside general counsel to private companies. He handles transactions in a variety of industries, including healthcare, financial services, software, retail, manufacturing, energy and aerospace. Prior to joining McGuireWoods, Jeff was an associate at large law firms in Boston and New York. While working at a previous firm, Jeff also completed a secondment in the in-house legal department at Goldman, Sachs & Co. in New York.

Ali Bryson is a Relationship Associate for SRS Acquiom’s payment and escrow services. She offers direct support to clients to ensure their experience is exemplary, and that their transaction needs are supported from the conception of a transaction until much after it has closed. Previously, Ali worked in the marketing department on various campaigns across all lines of business, and contributed to the thought leadership content stream as a writer and editor. In 2014, Ali was a payments analyst and client services liaison. She earned her BA in Communications and Media Studies from the University of Colorado in Denver.
Michael Bui is a Managing Director at FTI Consulting. Michael has more than 12 years of corporate recovery, corporate finance and financial advisory experience. He has advised clients in a diverse range of industries, including energy exploration and production, oilfield services, refining, engineering and construction. Michael’s experience includes forecast and liquidity assessments, business plan development and analyses, collateral evaluations, liquidation analyses and financial modeling. He also has advised clients on covenant negotiations, bankruptcy preparation, acquisitions and market assessment. Most recently, Mr. Bui served as Interim Chief Financial Officer (“CFO”) of Juniper GTL LLC.

Mathew Burpee is a Vice President, Mergers and Acquisitions at Lynx Equity Limited. Mathew was responsible for opening the Lynx’s Calgary office and the company’s expansion into Western Canada and Western United States. He is responsible for sourcing and executing acquisitions and oversees operations of select portfolio companies in that region. In addition, Mathew provides oversight and mentorship for analysts and associates. Prior to Lynx, Mathew worked for Ernst & Young. In addition to EY, Mathew co-founded Finance for Good. Mathew received a Bachelor of Commerce from Carleton University. He is also a designated Chartered Financial Analyst and Chartered Accountant, and was named a CA Gold Medalist and ICAA Early Achiever.

Mark C. Bussey is a Partner at Davis Graham & Stubbs. Mark’s practice focuses on mergers and acquisitions, private equity, joint ventures, and financings and securities in a broad range of industries, including energy, mining, financial services, real estate, hospitality and technology. He also counsels public companies on securities compliance and disclosure obligations, as well as corporate governance and other general corporate matters. Mark joined DGS after practicing for three years in the corporate department of Simpson Thacher & Bartlett LLP in New York.

Mark Casper is the Vice President of Finance at Headwaters MB and holds the Financial Operations Principal (FINOP) license for the firm. Mark manages the financial and regulatory operations of the firm. He is responsible for financial reporting and tax related matters as well as the daily management of FINRA compliance matters. Prior to his current role, Mark spent over 11 years in public accounting. During his career, he has specialized in both financial reporting and taxation. Mark holds a Certified Public Accounting (CPA) license in the states of Colorado, Ohio, and Florida (inactive). He completed his BA in accounting from Ohio Wesleyan University and an MS in accounting and taxation from Florida Gulf Coast University.

Audry X. Casusol is a Shareholder at Greenberg Traurig. Audry represents a wide-range of U.S. and international clients, including public and private companies and private equity clients. Her practice focuses on executive compensation and employee benefit matters, primarily in the context of mergers and acquisitions, divestitures, initial public offerings, restructurings, spin-offs and other significant corporate transactions. Audry also routinely advises boards of directors, compensation committees, management and executives on a range of matters. Audry also advises companies and their boards on convertible securities, debt/equity exchanges, effect of tax treaties, rules applicable to CFCs, PFICs and more.

Jenny E. Cieplak is a Counsel in the Corporate Group in Crowell & Moring's Washington, D.C. office and is a member of the firm's blockchain and distributed ledger technology initiative. Her practice primarily involves mergers and acquisitions, complex joint ventures, consortiums and strategic alliances, venture capital and private equity investments and corporate finance. Cieplak is also experienced in drafting a wide range of commercial agreements. Her practice focuses on FinTech and the financial services industry, including participants in and vendors to that industry. Cieplak also advises clients on commodities law.
Sean Clemens is a Senior Vice President at Park Lane Investment Bank. Sean joined Park Lane in 2009 as an intern and has since climbed the ranks to become the company's youngest partner in history. Sean wears many hats and is a versatile contributor to the company. He makes his mark in both of Park Lane's two main divisions—the Investment Bank and the Capital Group. Sean plays a principal role in the firm's financial analysis, due diligence, document preparation, and research. Sean is a key contributor to Park Lane's valuation practice and liaises with the firm's broker-dealer to manage compliance efforts. He has authored several SportsBusiness Journal articles and sports industry white papers on behalf of Park Lane. Sean is a graduate of Cornell University, where he earned a B.A. in Economics and Spanish.

Vanessa Coiteux is a Partner in the Corporate Group. Her practice focuses on securities, public and private mergers & acquisitions and corporate finance. She frequently advises issuers, underwriters, purchasers and sellers in connection with public and private offerings in Canada and abroad, public and private mergers and acquisitions as well as TSX-listed securities issuers on regulatory compliance, corporate governance and continuous disclosure requirements matters. Vanessa also specializes in cybersecurity. She also chairs the Montréal office’s Students & Stagiaires Committee which is in charge of recruiting students and stagiaires for the Montréal office of Stikeman Elliott. Ms Coiteux is a member of the Association of Quebec Women in Finance, the Young Bar Association of Montréal and the Jeune Chambre de commerce de Montréal.

Robert Collins is an Associate Director on the Non-Financial Corporate Product Management team at S&P Global Market Intelligence. He primarily focuses on building/enhancing new products, understanding market needs and conducting business development activities. He also works closely with senior management on financial/strategic analysis and marketing sizing of new opportunities. Rob joined S&P Global Market Intelligence in June 2005. Prior to joining S&P Global Market Intelligence, Rob worked at Bear, Stearns & Co. Inc. as an investment banking analyst in the technology, media and telecommunications group. Rob holds a BS degree in Business Management from Babson College and an MBA from the Samuel Curtis Johnson Graduate School of Management at Cornell University.

Enrique A. Conde is a Shareholder at Greenberg Traurig. As a member of the firm’s Corporate Practice, Enrique, who is licensed in Florida and New York, handles domestic and cross-border mergers and acquisitions, corporate financings, joint ventures and all types of general contractual matters throughout North, Central and South America, the Caribbean and Europe, including giving strategic advice to CEOs and General Counsels. Fluent in Spanish, Enrique has also advised Latin American and European companies doing business in the United States.

James Cook is an Associate at Blackford Capital and currently leads Blackford's Portfolio Company Operations Team. He is responsible for managing the equity value creation strategy, oversight, and governance of the firm’s thirteen portfolio companies, with direct oversight over four of those companies. He is also responsible for all Cross-Portfolio initiatives at Blackford, with a focus on knowledge sharing and leveraging synergies throughout the portfolio. James holds an MBA from the University of Michigan Ross School of Business and a BA in Economics from Hobart College. James is very active in the Grand Rapids, MI nonprofit community and currently sits on the Board of Directors for the Down Syndrome Association of West Michigan Foundation.
Alex Ditchfield: the man, the myth, the legend

Congratulations to Alex and to all the other Emerging Leaders

One Equity Partners
Divested its 48.08% equity stake in
NETAS
2017

Divested Harrys of London to
Charles Cohen
2017

Agreed to divest China foodservice business to
Huhtamaki
2017

Equity issue & JV with
2017

Divested VNPT ePay to
2017

Acquired Chinese food ingredients company
Tianning Flavours
2017
Frank Cordek is a Director at Signal Hill. Frank has nearly 15 years of investment banking, M&A advisory and consulting experience, primarily focused on Internet & Digital Media and Marketing Technology. He was instrumental in building Signal Hill’s Internet & Digital Media practice that has closed over 30 transactions since 2012. Prior to joining Signal Hill, he was an Associate at Updata Advisors. Frank also founded an advisory group to provide consulting and investment banking services to entertainment companies, financial service providers and entrepreneurs. Frank began his career as an investment banking analyst at McGladrey Capital Markets. He earned an M.B.A. in Finance and Entrepreneurship from the Tepper School of Business at Carnegie Mellon University and a B.S. in Biology and a Secondary Field of Study in Business from The George Washington University.

Alexandra Croswell Kelly is an M&A Partner in the Corporate Department of Latham & Watkins in the firm’s New York office. She has a broad-based mergers and acquisitions practice, encompassing acquisitions, dispositions, carve-outs, joint ventures, controlling and minority investments, and other general corporate matters. Kelly has developed a particular expertise advising financial institutions, private equity firms, corporate clients and emerging companies in the FinTech and financial services/asset management industry. Kelly received her JD (2008), cum laude, from the New York University School of Law, her MA (2005), with honors, from The University of Chicago and her BA (2004), summa cum laude, from Binghamton University.

Alexander Ditchfield is a Vice President at BDA Partners based in New York. He joined BDA in 2008. Before joining BDA, he worked on policy for the European Union’s SWITCH-Asia and Asia Invest projects, promoting sustainable development, trade and investment flow between EU and Asia, at the EU Project Incubation (EUPIC) Centre in Chengdu, China. He graduated with a BSc in Economics from Cardiff University in the UK. He speaks Mandarin and English.

Anthony Dolan is a Director at Prairie Capital Advisors with over 12 years of experience advising middle market companies and shareholders on mergers and acquisitions, capital raising, leveraged ESOPs, and strategic advisory engagements. Anthony is responsible for the execution and business development activities of Prairie’s M&A and ESOP practices. In addition to his transaction related responsibilities, he has been a mentor to many analysts, associates, and vice presidents at Prairie over the years. He is a regular speaker at industry conferences and has led numerous technical webinars and seminars. Anthony graduated from Benedictine University in Lisle, Illinois with a Master of Business Administration with a concentration in Financial Management and a Bachelor of Arts in International Business and Economics.

Julio Dominguez is a Vice President, Mergers and Acquisitions at Generational Equity. Julio guides clients in the marketing and sale of their businesses. His responsibilities include negotiating deal terms, the preparation of marketing materials, interacting with buyers and sellers, managing the due diligence process, and handling various other functions to facilitate deal closings. Julio began his career at Generational Capital Markets as a valuation associate. Julio was quickly promoted to Vice President within 2 years. Prior to joining Generational Capital Markets, Julio was a financial analyst at a leading firm conducting business and commercial real estate valuations. Julio holds a Bachelor of Arts from the University of Texas and a Master of Business Administration from Southern Methodist University.
We congratulate JONATHAN EDWARDS on being selected as an “Emerging Leader” by The M&A Advisor
Jen Dowd is a Chief Operating Officer at Backbay Communications. Jen helps to define the corporate vision and implement programs designed to realize BackBay’s strategic objectives including firm best practices, business development and marketing. Jen partners with other senior leadership to enhance the BackBay client experience, elevate the brand and accelerate growth. Since joining the firm in 2007, Jen has developed and led strategic branding, marketing and public relations programs for global asset management, private equity and financial technology clients. Jen joined BackBay from Compton Consulting. Prior to that, Jen served as an Editorial Assistant for Euromoney magazine in London. Jen received an M.A. in Ancient History from University College London, and a B.A. in Classics and English from the College of Charleston.

Andrew Eckstein is a Shareholder of LBMC’s Transaction Advisory Services group. With over 13 years of professional experience in audit and mergers and acquisition transaction services, Andrew has led buy- and sell-side diligence engagements across a broad range of industries and deal sizes. He has participated in financial due diligence engagements within the healthcare, technology, entertainment, printing/publishing, manufacturing, business services, food & beverage, industrial, specialty finance, and distribution industries. He is a member of LBMC’s Private Equity coverage group and the Manufacturing and Distribution segment leadership group. Andrew obtained both his bachelor’s and master’s degrees from the University of Michigan. Prior to joining LBMC, he served as a Director in Duff & Phelps, LLC’s Transaction Advisory Services group and also spent three years in the Chicago office of PwC.

Huw Edwards is a Chief Financial Officer, Chief Strategy Officer, and a Director on the board of Jungle Disk. Prior to acquiring Jungle Disk from Rackspace, Huw worked as a senior management associate at Bridgewater Associates. Before Bridgewater, Huw spent time at Rackspace where he became the general manager of Jungle Disk responsible for day-to-day operations. Earlier in his career, he made private equity investments at Bridges Ventures, and worked in investment banking at Goldman Sachs. Huw received his MBA from Harvard Business School where he was a Ford Scholar and Baker Scholar. He also holds undergraduate and master’s degrees in Mathematics from Oxford University.

Jonathan Edwards is a Partner on Alston & Bird’s Bankruptcy & Financial Restructuring Team. He represents a variety of clients in complex bankruptcy cases, workouts, debt restructurings, distressed acquisitions and dispositions, and complex commercial litigation. Jonathan focuses his multidisciplinary practice on assignments combining traditional restructuring advice with transactional and major litigation work. He also counsels and represents directors, officers, Chapter 7 trustees and others in complex bankruptcy and commercial litigation. Jonathan is also actively involved in advising clients on bankruptcy structuring issues in leveraged finance, securitization and structured finance transactions.

Jessica Ekeberg is the Vice President, Global Investor Relations of Tennebaum Capital Partners, LLC and TCP Capital Corp. Prior to joining TCP in 2007, she worked at First Republic Bank in the Business Banking group, primarily processing small business loans. Jessica received her B.A. in Psychology and Communication Studies from Northwestern University.
NFP IS PROUD OF OUR OWN M&A
2017 EMERGING LEADERS AWARD
WINNERS — EVAN MICHAEL AND
ADAM FAVALE!

Congratulations to all of the young professionals who are among this year’s M&A Emerging Leaders Awards winners. We celebrate your present and future accomplishments!

NFP is a leading insurance broker and consultant that provides employee benefits, property & casualty, retirement and individual private client solutions through our licensed subsidiaries and affiliates. Our expertise is matched only by our personal commitment to each client’s goals.

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Steven Ellis is a Vice President and Regional Director at AST. He works closely with issuers, attorneys, and advisors on transactions spanning the lifecycle of companies. This involves mapping out the mechanics to ensure a clear understanding of how the transaction will flow from the perspective of the transfer, paying, exchange, escrow, or tender agent and subsequently coordinating to ensure flawless execution and an excellent experience for all parties involved. His IPO, M&A, Proxy, and Corporate Restructuring experience has spanned the globe from routine to deeply complex transactions with unique moving parts and complexities.

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S&P Global congratulates our colleagues Zoe Zhou, Laura Guerra, and Robert Collins for being amongst the 8th Annual Emerging Leaders Award winners.

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Adam Ghander is a Partner in the Business Department and co-chair of the Private Equity Group at the Boston-based law firm Nutter McClennen & Fish LLP. Adam represents middle market sponsors, strategic acquirers, and emerging companies in private capital finance, mergers and acquisitions, and corporate governance matters. He works extensively in industries such as manufacturing, high technology, financial services, food and beverage, and professional sports. Adam has guided acquirers and targets through auctions, structured earn outs and valuations adjustments, and counseled officers and directors on fiduciary duties in the context of significant corporate transactions.

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SSG Capital Advisors is an independent boutique investment bank that assists middle-market companies and their stakeholders in completing special situation transactions. We provide our clients with comprehensive investment banking services in the areas of mergers and acquisitions, private placements, financial restructurings, valuations, litigation and strategic advisory. SSG has a proven track record of closing over 300 transactions in North America and Europe and is a leader in the industry.

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White & Case congratulates Andrew Kreisberg for his M&A Advisor Emerging Leader Award recognition, as well as his fellow award winners and finalists.
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We congratulate Brian Maloney and Luke Ericson on their outstanding achievements and we extend warm wishes of continued success.

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Edric Low is an Associate for Lynx Equity Limited. He has been a prolific contributor to Lynx’s rapid growth over his four years at the firm, sourcing and executing 6 platform acquisitions, while acting as an oversight lead on three other existing portfolio companies. Edric’s superb ability to identify high-potential opportunities, along with his ability to analyze and recommend buyer-favorable terms, has led to his deals generating an average IRR exceeding 30% thus far. In addition to his M&A role, Edric acts as a key resource for the rest of the Lynx team. He is the primary mentor for interns and new Analysts, and regularly takes an active role in Strategic Operational initiatives led by other Lynx departments.

Ilana Lubin is a counsel in Crowell & Moring’s Corporate Group. Ilana frequently represents clients in the apparel, fashion, retail, luxury, and beauty sectors in connection with cross-border and domestic mergers and acquisitions, joint ventures, and private equity investments. She routinely drafts and negotiates intellectual property licensing and other general corporate and commercial transactions, and she has experience working in-house across business units, including in connection with global merger and acquisition and licensing activity. Ilana’s background includes the representation of a variety of companies from inception, including advisement with respect to matters relating to formation and structuring, equity and debt financing, employment, and commercial leasing.

Jenna Luvin is a Director of Marketing at Headwaters MB. Jenna was recruited to play soccer at Binghamton University where she majored in Business Management and Marketing. In college, Jenna interned for BlackBox Logic, LLC. After interning for 2.5 years at BlackBox she joined the firm full-time upon graduating in 2011 in their office in Denver, CO. In 2012, Jenna founded Quarterly Karma a non-profit event planning company after Hurricane Sandy, which raised funds for different causes through quarterly events while working full time. After 2 years at BlackBox, Jenna was offered a position with FMI Capital Advisors as their Marketing Manager. In 2014, Jenna began working at Headwaters MB as the Digital Marketing Manager and was promoted to Director of Marketing in 2015 – leading the marketing and recruiting apparatus for the company.

Brian Maloney is a Director at AlixPartners. Throughout his career, Brian has worked closely with under-performing companies in a wide variety of corporate recovery situations. His experience, amassed over more than a decade, covers a multitude of critical proficiencies. His assignments include work performed on behalf of companies in the gaming, chemical, environmental services, transportation and retail industries. From mid-2008 until mid-2009, Brian transferred to his prior employer’s affiliate in Melbourne, Australia, to work on one of the most high-profile voluntary administrations in the Australian State of Victoria ongoing during that time. Brian was awarded the CIRA / Randy Waits Bronze Model in 2009, having achieved the third-highest scores of all CIRA candidates in that year.

Jared Manes is a Partner at Jenner & Block. A lawyer in the firm’s Corporate Department, Jared represents privately and publicly held companies in a broad range of corporate matters. He counsels clients in a wide variety of industries including manufacturing, pharmaceuticals, medical devices, food and beverage, defense, software, retail, banking and finance, energy, technology, entertainment and home improvement. Jared has extensive experience representing international companies, particularly those based in the Nordics, and also serves as legal counsel to US companies pursuing potential acquisitions around the world. While at Jenner & Block, Jared worked as a visiting lawyer in the corporate department of one of Denmark’s leading law firms. He also worked in the Office of Institutional Integrity at the Inter-American Development Bank.
Jonah Mann is a Partner in the Mergers & Acquisitions and Capital Markets Groups in Stikeman Elliott’s Toronto office. Jonah’s practice focuses on mergers and acquisitions, corporate finance, corporate governance and securities law compliance. Jonah regularly acts for public companies in Canada and the U.S., as well as leading investment banks on complex capital markets transactions including IPOs, acquisition financing, cross-border offerings, takeover bids and business combinations. He also frequently represents Canadian and U.S. private equity firms on public and private M&A transactions and strategic investments across a range of industries and with a particular emphasis on retail and technology industries.

Edward Margarit (Ted) is a Principal in Chartwell’s national Corporate Finance practice where he focuses on M&A and Capital Markets transactions including executing Employee Stock Ownership Plan (“ESOP”) transactions. Ted earned his MBA in Corporate Finance and Real Estate from the University of North Carolina’s Kenan-Flagler Business School, a Juris Doctor from the University of St. Thomas School of Law, and a Bachelor of Business Administration in Aviation Management from the University of North Dakota. He is admitted to practice before the North Dakota Federal District Court, the United States Tax Court, and the U.S. 8th Circuit Court of Appeals. Ted is a member of the Legislative and Regulatory Advisory Committee of The ESOP Association.


Scott Mates is a Managing Director in the Restructuring and Special Situations Group (“RSSG”) at PJT Partners, a public spin-off from Blackstone. Since joining Blackstone in 2011, Scott has assisted in advising on a variety of restructuring transactions and strategic advisory assignments. Before joining Blackstone, Scott worked as a distressed research analyst at Southpaw Asset Management. Prior to Southpaw, Scott was an associate at Citi Private Equity. Scott began his career as an analyst at Salomon Smith Barney. Scott received a B.S. in Business Administration from Babson College, and an MBA in Finance from The Wharton School of the University of Pennsylvania.

Stephen McLachlan is a Vice President at Headwaters MB. Stephen was born in Buffalo, NY. A standout lacrosse player in high school, he was recruited to play for the lacrosse team at Yale University, where he majored in History and graduated in 2011. After college, he moved to NYC to work for Royal Bank of Scotland as an analyst in their Leverage Finance Group. After 2 years at RBS, Steve transitioned to the role as an Associate at Macquarie Capital in their Financial Institutions M&A group. After 3 years at Macquarie, Steve moved to Denver and began working at Headwaters, MB as a Vice President, helping to lead the Investment Bank’s private equity coverage practice.

Tanya Meerovich is a Senior Managing Director at FTI Consulting and a rising star in the Corporate Finance & Restructuring practice. She is a well-rounded professional who has advised companies, creditors and government bodies across many industries. Prior to joining FTI Consulting, Tanya was in the Financial Services Advisory group of RSM Cayman Islands. Prior to that, Tanya worked for a securities broker-dealer in the Chicago area. Tanya has authored several articles and has also moderated and participated on several panels. Tanya holds a B.S. in Business Management and Finance from Roosevelt University in Chicago. She is a Chartered Financial Analyst, a Certified Insolvency and Restructuring Advisor and a Certified Fraud Examiner.
Evan Michael is an Executive Vice President at NFP Corp. During his over 10-year tenure he’s seen the company survive the financial crisis, shift gears, go private and grow into a valuation of more than $3 billion. After completing his undergraduate studies at the University of Pennsylvania and law school at New York University, Evan began his career as a mergers-and-acquisitions attorney for Skadden Arps and a private equity and mergers-and-acquisitions associate at Goodwin Procter.

John Mickelson is a Founding Partner at Midwest Growth Partners. Prior to that, John was a Managing Director at The PrivateBank (NASDAQ: PVTB) where he was responsible for identifying and structuring loans for middle-market companies. Before PVTB, John worked as an investment banker for First National Bank of Omaha, where he provided M&A advisory services to middle-market companies and at Goldman Sachs in their asset management division. Starting at age 14, John has also owned and operated three small companies. John received his BBA, MBA, and JD all from the University of Iowa, where he was an Academic All Big 10 selection and letter-winner on the football team. Away from MGP, John serves as a City Councilman for West Des Moines, Iowa, a board member for the State of Iowa Historical Society and John Pappajohn Entrepreneurial Center, and is active in his church, St. Francis of Assisi.

Andrew Milano is a Partner in the Corporate and Business Transactions practice of Morgan Lewis. Resident in the New York office, Andrew advises enterprises on joint ventures, commercial contracts, and general corporate and compliance matters in US domestic and cross-border mergers, acquisitions, and dispositions. Andrew regularly advises clients in acquisition and divestment deals involving a range of assets, from container terminals, power generation facilities, and regulated water and wastewater plants to enterprises in the international energy services sector.

Livingston Miller is a Counsel at WilmerHale. Livingston has a general corporate practice with an emphasis on the representation of buyers, sellers and boards of directors on mergers, acquisitions, divestitures, joint ventures and other strategic transactions. Livingston also represents emerging companies with respect to a wide range of issues, including initial organization and incorporation matters, financing and sales transactions. Prior to joining WilmerHale, Livingston was an associate at Davis Polk & Wardwell LLP.

Peter Newman is a Partner in Milbank, Tweed, Hadley & McCloy’s Financial Restructuring Group in London, where he advises sophisticated clients on the world’s most complicated restructurings. Peter began his career with Milbank in New York advising on chapter 11 bankruptcy cases. Six years ago he relocated to London to help build an international restructuring practice from the ground up. Peter advises companies and key investors on restructuring over-leveraged capital structures in any industry and any jurisdiction, with a particular focus on distressed acquisitions. Prior to his career at Milbank, Peter attended New York University School of Law and studied philosophy at the University of Maryland. Peter is a term member of the Council on Foreign Relations and a member of Chatham House: Royal Institute for International Affairs.
Bravo.

Congratulations to all of the winners of the M&A Advisor Emerging Leader Awards, with a special congratulations to our five Deloitte winners - Karthik Krishnamoorthy, Miguel Llovesa, Nadia Orawski, Simon Singh and Mike Wilkin.
Mike North is a Partner in Katz, Sapper & Miller’s Transaction Services Group, where he provides due diligence and advisory services to private equity and strategic clients. Working on both buy side and sell side, Mike analyzes various aspects of a company’s business functions to help clients make the most of every opportunity. As a member of the firm’s Audit and Assurance Services Group, Mike has extensive experience advising clients in accounting, financial reporting, auditing, compliance and internal control matters. Additionally, Mike has considerable experience working with specialty finance companies, including car dealerships and equipment leasing businesses.

Elena Nosova is the Chief Financial Officer and Vice President at Enter Capital. Her focus is supporting technology companies by providing M&A and Investment Relations support in California. Elena has nearly 10 years of experience and a track-record of over $2 billion in securities placements for a Global Fortune 100 company Gazprom (LSE: OGZD). Her expertise is finance, business development, and investor relations. She refers to herself as a truly international professional, she has already worked in four countries: The United States, Russia, Cyprus, and Chile. She also holds an MBA degree from Hult IBS. Elena supports international startups all over the world, especially female founders.

Melissa Odorzynski is the Vice President, Corporate Development for Genoa, a QoL Healthcare Company, leading all M&A efforts, as well as strategic planning for the organization. Melissa joined Genoa as a pharmacist in 2006, and opened a pharmacy on-site within a mental health center in Madison, Wisconsin, which quickly grew to be one of Genoa’s most successful operations. Over the following decade, Melissa was instrumental in the growth of the company from approximately 20 pharmacies when she joined to over 350 today, both organically and through key acquisitions. Melissa has held leadership roles within operations, training, sales, marketing, and now corporate development. Over the past 2 years, she has led 7 key strategic acquisitions. Before joining Genoa, Melissa worked as a pharmacist for CVS in Baltimore, MD. Melissa graduated from Drake University with a Doctor of Pharmacy (PharmD) in 2005 and earned her Master of Public Health from Johns Hopkins University in 2007.

Nadia Orawski is a Principal in Deloitte’s M&A practice. She has over 15 years of experience advising financial service clients in the areas of operational divestiture, integration and restructuring. Nadia assists companies transform their core business models to compete in an increasingly competitive financial services industry. Within Deloitte, Nadia is a leader in Financial Services M&A, helping to grow strategic client relationships and developing a team of 300+ experts in this space. In addition, Nadia has served on the Deloitte Advisory Committee to the Consulting CEO and is an active leader in the Women’s Initiative (WIN) helping mentor and grow the next generation of women leaders within the firm. Before joining Deloitte in 2007, Nadia worked in Toronto, Canada advising Financial Services clients on consolidation and rationalization of their real estate. Nadia graduated with an MBA from the Schulich School of Business.

Mikel Parker is a Managing Director at Atlanta based Genesis Capital, LLC where he works with middle market companies across a range of industries including healthcare, manufacturing, retail, restaurants, business services, entertainment and technology among others. Mikel has nearly 20 years of banking experience, specializing in mergers & acquisitions and public and private debt and equity capital raises over which time he has completed an aggregate transaction value of over $4 billion. Prior to joining Genesis Capital, Mikel was a Vice President at Shattuck Hammond Partners. Before Shattuck Hammond, Mikel was an Assistant Vice President in GMAC Commercial Finance’s Asset Based Lending Division. Prior to GMAC, Mikel was a Senior Analyst in the Investment Banking Group at Robertson Stephens. Mikel earned a Bachelor of Arts degree in Economics from Washington and Lee University and his Master of Business Administration degree from Goizueta Business School at Emory University.
Clearsight Advisors congratulates Bhavin Patel for being recognized as an Emerging Leader by The M&A Advisor

Bhavin Patel is a Co-Founder and Partner at Clearsight Advisors where he leads the rapidly evolving Customer Experience, Sales Enablement and Employee Engagement sector coverage for Clearsight.

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Anshu Pasricha is a Shareholder at Koley Jessen P.C. Anshu has a broad, multidisciplinary practice that includes counseling corporate clients and private equity sponsors in domestic and international mergers and acquisitions, joint ventures and partnerships, divestitures, and in general corporate matters. Anshu has advised on more than 60 closed domestic and cross-border M&A transactions in a wide variety of industries. Anshu has also advised clients in connection with making, restructuring, and exiting their investments in Australia, Latin America, Europe, the Middle East, and Southeast Asia. Anshu acts as outside general counsel to clients. In addition, Anshu advises clients on complex transactional matters. Anshu has experience in engaging hostile joint venture partners in extra-contractual negotiations, and conducting FCPA due diligence in the context of mergers & acquisitions, joint ventures and strategic partnerships.

Sanjay Patel is a Managing Director at Raymond James. Sanjay has nearly 17 years of investment banking experience, the vast majority of which has been within the Financial Services Investment Banking Group of Raymond James, covering depository institutions nationwide. Joining Raymond James in 2000, Sanjay has participated in the rapid growth of the depository practice, both organically and through acquisitions, and has been active in both M&A advisory and financing activities (public and private) for banks and thrifts. Prior to Raymond James, Sanjay worked in the financial services group at McDonald Investments, Inc. He graduated from Northwestern University with a bachelor’s degree in economics and a minor in African studies.

Bhavin Patel is a Co-Founder and Director for Clearsight Advisors. Prior to co-founding Clearsight, he was a Vice President with Houlihan Lokey where he was part of the Business Services M&A team. Prior to Houlihan, Bhavin was with Avondale Partners where he focused on M&A and capital raising for both public and private companies in the broader technology industry. Bhavin started his career with a brief stint working in J.P. Morgan’s Internal Consulting Services group.

Oscar Pinkas is a Partner and a member of Dentons’ Restructuring, Insolvency and Bankruptcy practice. He represents clients in and out of court in stressed, distressed, workout, insolvency and bankruptcy situations, whether in operational restructurings, transactions, litigation or other matters. Oscar has been named a Top Rated Bankruptcy Attorney in New York by Super Lawyers, a Top Attorney Under 40 in Bankruptcy by Law360 and a Top Bankruptcy Lawyer by The Deal Pipeline. In 2017, he received the Turnaround Atlas Awards’ Cross-Border Turnaround of the Year Award for representing Conuma Coal Resources Ltd., and the Community Impact Award for representing ERP Iron Ore, LLC. He also received the Materials Deal of the Year Award from The M&A Advisor for Molycorp.

Andrew Ponomarev is a Founder of Enter Capital. Andrew has executed over 20 successful M&A and Private Equity transactions in various roles ranging from an Investment Banking professional to the Head of Investment department at a $1 billion USD asset management firm. Following his principle investment experience, Andrew founded Enter Capital. His company is the only firm that sources investment and M&A deals on behalf of global investment funds, family offices, and corporate buyers, and helps tech businesses find the right capital partners for global expansion. Andrew’s most recent engagement was assisting an NYSE-listed with performing buy-side M&A activities in the healthcare IT industry. Also, Andrew volunteered his time to support technology ventures as a mentor of an online technology entrepreneurship course taught by Stanford University.
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Walter Popiel is a Managing Director at Conway McKenzie. Walter specializes in providing turnaround and crisis management services to under-performing companies in a variety of industries, including retail fuel and convenience store operations, healthcare, automotive, heavy truck, energy, injection molding, wind turbine, electronic component manufacturing, construction, and oil and gas. Most recently, Walter was chosen as one of ten individuals awarded in Turnarounds and Workouts as “2017 People to Watch – Business Professionals Making Their Mark.” Prior to joining Conway MacKenzie, Walter completed a Management Development Program and served as a Project Manager for Flagstar Bank. More recently, Walter served as a Consultant for the Audit Enterprise Risk Services practice at Deloitte and Touche. Walter holds a bachelor’s degree in finance from Western Michigan University.

Avik Pramanik is a Principal in L Catterton’s global flagship buyout fund. He is responsible for identifying, sourcing and executing investments in growing consumer product enterprises, globally. In addition, Avik leads L Catterton’s investing efforts in the beauty and personal care categories and currently sits on the Board of Directors of Bliss, Elemis, StriVectin, Saje, SteelSeries and PIRCH. Prior to joining L Catterton, Avik served as Director of Strategic Development for Alterna. Prior to Alterna, Avik worked at TSG Consumer Partners. Avik began his career at Goldman Sachs, where he was a member of the Principal Investment Group and the Investment Banking Division’s Consumer Products and Retail group. Avik graduated Magna Cum Laude with a BSBA in Finance and International Business from Georgetown University.

Omar Pringle is a Corporate Partner based in the New York office of Freshfields Bruckhaus Deringer US. Omar focuses on cross-border public and private M&A, private equity transactions, venture capital and general corporate governance, as well as advising on commercial arrangements. Joining Freshfields Bruckhaus Deringer as an associate in 2008, he was promoted to the partnership in May 2017 making him the firm’s first homegrown M&A partner in the United States and currently its youngest partner in the United States. Omar speaks French, Spanish and Arabic, and he serves on the recruiting committee and is active in the firm’s recruiting efforts in the United States. Omar received his JD from the University of Pennsylvania and a certificate in Business and Public Policy from the Wharton School, a French “Master” with Honors in International Business Law from the Sorbonne and Sciences-Po in Paris, and a BA with Honors from Georgetown University.

Edward Prokop is a Partner at Jenner & Block. Edward advises clients in a variety of domestic and cross-border public and private transactions, both on the buy-side and sell-side, including mergers, stock and asset purchases, restructurings and leveraged acquisitions, as well as joint ventures and strategic alliances. Additionally, he represents private equity and asset management clients on a variety of transactions, including acquisitions, portfolio company transactions and the formation of private investment funds. A member of the Corporate, Mergers & Acquisitions and Private Equity Practices, Ed has worked closely with clients from a broad spectrum of industries including, among others, energy, infrastructure, healthcare, food production and distribution, manufacturing, media, technology and investment management.

Landon S. Ralford is a Partner at Jenner & Block. Landon is a bankruptcy lawyer and has significant experience in a wide-range of bankruptcy and bankruptcy-related matters. Landon is a member of the firm’s Restructuring and Bankruptcy Practice. He represents debtors, trustees, creditors, and committees in Chapter 7 and 11 cases in a variety of contexts, including litigation and mediation, out of court restructurings, and the purchase and sale of assets in bankruptcy. Landon’s practice also includes advising creditors in their dealings with financially troubled entities as well as assisting those entities in protecting their rights in the bankruptcy process. Landon also has extensive appellate experience. In addition to his private practice, Landon is heavily involved in pro bono matters.
Bryan Rand is a Partner and Head of Transaction Execution at Belstone Capital. Bryan has over $14 billion of finance, structuring, and negotiation experience across 28 completed transactions including mergers & acquisitions, equity financings, leveraged buy outs, and debt financings. Prior to joining Belstone, Bryan helped launch Brightwood Capital Advisors. Prior to this, Bryan worked in Credit Suisse’s control private equity investing affiliate, DLJ Merchant Banking Partners, as well as in the firm’s investment bank. Bryan holds an M.B.A. from Harvard Business School where he was a Credit Suisse Fellow. Bryan also graduated magna cum laude from Morehouse College with a B.A. in German Studies and a B.A. in Business Administration with a concentration in Finance. He also holds his FINRA Series 79 and 63 licenses.

Raghav Rao is a Partner/Principal at EY and specializes in M&A focused on Private Equity. He has over 18 years of experience across deal life-cycle including origination, due-diligence, sign-to-close, post-close-transformation, value-creation and exits. He has managed various consulting assignments advising C-level executives in the U.S., Europe and Asia-Pacific. His experience spans a broad range of sectors including financial services, retail and distribution, diversified industrial, business and IT services. Prior to EY, Raghav managed his own Management Consulting Company in New York. Since joining EY in 2011, Raghav has managed more than 150 transactions. His entrepreneurial spirit combined with EY brand and infrastructure helped him establish and grow the M&A Technology practice.

Robert Reavis is an Associate at ButcherJoseph & Co. During his tenure at ButcherJoseph & Co., Robert has advised a diverse group of middle market companies on mergers and acquisitions, capital raising and strategic advisory assignments. Prior to ButcherJoseph & Co., Robert worked as a Mergers and Acquisitions Analyst at Societe Generale. Prior to this, Robert was a Research Analyst at the University of Chicago Booth School of Business, where he received his B.A. in Economics and International Studies.

Daniel Riley is Corporate and Securities Counsel at Choate Hall & Stewart, joining the firm after practicing with a Wall Street law firm in New York. Mr. Riley has been named a Massachusetts Super Lawyer Rising Star. He is a versatile corporate lawyer who counsels clients regarding a wide range of transactional and corporate law matters. Mr. Riley advises clients across the spectrum – from private equity funds to public companies – on significant mergers, acquisitions, and similar transactions as well as day to day strategic and commercial matters. Mr. Riley graduated magna cum laude and Order of the Coif from the University of Pennsylvania School of Law, where he received his JD in 2008. Prior to attending law school, Mr. Riley served his country as a commissioned officer in the United States Navy for four and a half years after graduating from Penn State University in 1999 with a BS in Computer Science.

Matthew Rizzo is a Senior Associate at O’Keefe. Matthew provides business valuation expertise in many types of transactions including, but not limited to mergers and acquisitions, shareholder disputes and gift tax valuations providing objective, independent valuations according to facts and circumstances surrounding your individual engagement. Mr. Rizzo provides litigation economic damages analysis to clients with a variety of issues. Mr. Rizzo also provides extensive corporate turnaround consulting services. Mr. Rizzo holds a MBA with a Concentration in accounting from Davenport University and a Bachelor of Science in Interdisciplinary Studies with Concentrations in Business and Sociology from Arizona State University. He is a Certified Public Accountant (CPA) and is accredited by the National Association of Certified Valuators and Analysts (NACVA) as a Certified Valuation Analyst (CVA).
Matt Roberts is a Director, Investment Banking, at FirePower Capital. Coming from humble roots in Eastern Canada, Matt earned his MBA and subsequently joined a Toronto-based institutional dealer as part of their Investment Banking team. While there, Matt assisted public companies in raising over $3 billion of equity across a range of industries including technology, renewable energy, manufacturing, logistics and resources. During this time, he attained a leadership role as Vice-President and earned his CFA Charter. Matt left the firm in 2014 to join an “Internet of Things”, technology-focused Venture Capital firm. In 2015, Matt moved back to the advisory side, joining FirePower Capital’s Investment Banking team. As a Director, Matt oversees five team members and is responsible for all aspects of the M&A process.

Andy Robison is Chair of Bradley Arant Boult Cummings LLP’s Corporate & Securities Practice Group. He leads a team of more than 50 lawyers to grow the firm’s practice and brand name. Andy is also co-chair of the Family-Owned Business Team, and a former member of the firm’s Recruiting Committee and Business Review Committee. Andy works with the firm’s Growth & Expansion Committee to recruit and integrate lateral attorneys. Andy advises primarily privately-held companies and private equity funds and their operating companies in formation, merger and acquisition and corporate finance transactions. He also advises clients in securities offerings, joint ventures and general corporate and securities law issues. Andy received his J.D. from Washington & Lee University School of Law, cum laude.
Bradley congratulates Andy Robison on being selected as a 2017 Emerging Leaders Award winner

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Chad Rolston is a Partner in the Corporate Department of Latham & Watkins LLP in the firm’s Silicon Valley office. His practice focuses primarily on mergers and acquisitions, and he regularly advises public and private companies, private equity firms and venture capital firms in their strategic transactions. His practice also includes strategic corporate planning; public and private financing transactions, including debt and equity; and general corporate representation of both publicly traded and privately held companies. Chad has represented clients across a range of industries, including semiconductors, life sciences, internet and digital media, information technology and retail and consumer products. He received his JD (2007) from Harvard Law School and his BS (2000) from American University.

Allan Rooney is a Partner at Rooney Nimmo. Allan is a graduate of the Edinburgh University Law School in Scotland, where he graduated with honors. He also studied at the University of Texas Law School in Austin through a merit-based scholarship awarded by the University of Texas in conjunction with the University of Edinburgh. Upon relocating to New York, Allan worked as a commodities trader before beginning his legal career at Deloitte & Touche LLP. He later worked at a boutique, commercial litigation and corporate law firm representing corporate clients. With the backing of his clients, Allan founded the firm in 2007 and attributes its growth to its commitment to providing the highest possible level of client service, coupled with sophisticated business-focused legal advice. Allan is admitted as an attorney in New York.

Jim Rubbo is a Director, Business Integration & Strategy, at VWR. Jim graduated from Drexel University with a Bachelor’s degree in Accounting in 2004. After graduation, he was hired by PwC LLC in Philadelphia. Jim joined the Internal Audit team at VWR in November 2007 and quickly became an integral part of the Company. He was promoted to Corporate Accounting Manager in January 2012, then promoted to his current role in September 2014. In this position, Jim was vital in helping to establish a post-merger integration team. He develops a structured approach to each acquisition and tracks progress throughout each project, keeping all key stakeholders informed. He also coordinates detailed communication plans around each integration to ensure key integration dates are achieved.

Ben Rudman is a Director at SDR Ventures. Ben assists middle-market clients in executing mergers and acquisitions and securing equity and private debt financing. He holds a Series 79 securities license. Ben leads SDR’s Food & Beverage and Health & Wellness Teams, including the authorship of quarterly reports for each of these industries. He has robust knowledge of food & beverage and health & wellness value drivers and trends. Ben also co-leads SDR’s financial sponsor and debt capital markets coverage. Prior to joining SDR, Ben worked as a corporate development analyst at a national restaurant chain. Ben has a Bachelor’s of Arts in Economics and Business from Cornell College.

Matthew Safaii is the Founder and Managing Partner of Arrowroot Capital. His primary responsibilities include overseeing investment professionals & operating partners, qualifying deals, conducting due diligence, executing transactions, and monitoring portfolio companies. Matthew has worked at several private equity firms in the US and Europe. He is also an entrepreneur. His deal and board experience is concentrated in growth equity investments, but also has experience in leveraged buyouts and restructuring. Before founding Arrowroot Capital, Matthew was a Managing Director and Head of the Acquisitions Team at Actua Corp. Prior to Actua, Matthew worked in the technology group at TA Associates in the Boston and London offices. During his tenure, Matthew was an active investor. Prior to TA Associates, Matthew worked at Platinum Equity in Los Angeles. Matthew was also the co-founder of Quewey.
On behalf of West Monroe Partners,

CONGRATULATIONS TO

KYLE SARAUSKY

for being named one of M&A Advisor’s Emerging Leaders.

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David Sambur is a Senior Partner in the Apollo Global Management’s Private Equity business, where he is responsible for sourcing, executing and monitoring investments across the gaming, lodging, leisure, media and telecom industries. Prior to joining Apollo as an Associate, David began his career as a member of the Investment Banking division of Salomon Smith Barney Inc. David graduated summa cum laude and Phi Beta Kappa with a BA in Economics from Emory University. David took his first board seat at age 27 and currently serves on the board of directors of AGS Capital LLC, Caesars Acquisition Company, Caesars Entertainment Corporation, Coinstar LLC, Diamond Resorts International Inc., Rackspace Inc., EcoATM, LLC and Redbox Automated Retail LLC. He is a member of the Mount Sinai Department of Medicine Advisory Board.

Kyle Sarausky is a Senior Manager in West Monroe’s Mergers & Acquisitions practice, based in New York. A recognized expert in merger and acquisition transactions—including diligence, post-close integration, and carve-outs—Kyle has supported over 200 deals during the course of his career. His experience includes buy- and sell-side diligence for acquisitions across industries, as well as transactions in North America, Europe, and Asia. In addition to serving clients, Kyle has helped build both West Monroe’s national M&A practice and the firm’s New York City office. He earned a degree in Business Management and Entrepreneurial Studies from Seton Hall University. He also serves on the advisory boards of several not-for-profit organizations, as well as a digital advertising agency that he helped start.

Ryan Schafer is a Vice President of Accounting and Treasury at Impinj. He is a positive, dedicated leader, committed to enabling Impinj’s vision of providing digital life for everyday items. His leadership has helped guide Impinj through a successful IPO, and ongoing company growth. Mr. Schafer is both an awesome employee, and a welcoming face at the office who many are proud to call their friend. Beyond his strong leadership at work and on the board of the King County Sexual Assault Resource Center.

Adam Schlesinger is a Managing Director in PJT’s Restructuring and Special Situations Group (“RSSG”). Prior to Blackstone’s spin-off of its advisory businesses to create PJT Partners, Adam worked at Blackstone from 2010-2015. Before joining Blackstone, Mr. Schlesinger worked as an Associate at the private equity firm Clarion Capital Partners. Prior to Clarion, Adam was an Analyst at Bear, Stearns & Co. Inc. in the Technology, Media & Telecom group. Mr. Schlesinger earned a dual-degree with a B.S. in Economics and a B.A. in Philosophy from the University of Pennsylvania, where he graduated cum laude, and an MBA in Finance from The Wharton School of the University of Pennsylvania.

Patrick Schnepf is a Vice President of Global Sales at SmartRoom. Pat has more than 13 years of experience working in both financial and technology sales. He has a proven track record of driving revenue and shareholder value while leading sales organizations at companies like IntraLinks, Box and BMC Group. During his tenure at IntraLinks, he was a key member of the sales organization driving significant year or year revenue increase which led to a successful IPO. In his current role, Pat is responsible for developing and expanding BMC Group’s global sales strategy to increase market share utilizing both direct and channel sales models. Pat holds a bachelor degree in Business Management from Dowling College, Oakdale, NY.
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Three Twenty-One Capital Partners’
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Ketan Shah is a Managing Director and Associate General Counsel for Mesirow Financial. Ketan also serves as general counsel for Mesirow Financial’s Investment Banking group. He assists the Investment Banking team in all aspects of the transaction process—from negotiation of engagement letters to assisting clients with structural and transactional issues. In addition, Ketan leads all corporate matters for the Mesirow Financial. Prior to joining Mesirow Financial in 2012, Ketan worked in the corporate practice of Kirkland & Ellis, LLP. Previously, he was an auditor at Deloitte. Ketan earned a B.S. in Accounting from the University of Illinois at Champaign-Urbana and a J.D. from Northwestern University School of Law. Ketan is a Certified Public Accountant (CPA – Inactive).

Paul Sheaffer is a Managing Director in PJT Partners’ Restructuring & Special Situations Group (“RSSG”). Prior to Blackstone’s spin-off of its advisory businesses to create PJT Partners, Paul worked at Blackstone from 2009–2015, where he advised companies, creditors, boards of directors and financial sponsors in restructurings, special situations and financings across a wide range of industries. Before joining Blackstone, Paul worked at Angelo, Gordon & Company where he concentrated on distressed private investments. Paul received a BS in Finance and MSA in Accountancy from Wake Forest University.

Daniel Simon is a Partner at DLA Piper and concentrates his practice on corporate restructuring and bankruptcy. Daniel has been actively involved in numerous complex restructuring and acquisition matters on behalf of the Firm’s clients, with a particular emphasis in the oil & gas, retail, health care, medical services, technology and other industries. Daniel has extensive experience counseling clients on strategic alternatives, corporate transactions and general corporate governance matters to best position them during distressed periods. Daniel’s focus is on protecting and advancing the interests of distressed companies and parties seeking to purchase distressed assets in commercial workouts and chapter 11 reorganization cases.

Simon Singh is a Leader in Deloitte’s M&A IT practice. Simon helps clients with their most complex due diligence, integration, and divestiture transactions across a diverse set of industries including Technology and Financial Services. Simon has authored several publications and articles on M&A IT including “CIO Compass” , “Wired for Winning”, and the “M&A IT Compendium.” In addition, Simon has published articles on M&A in the Wall Street Journal. He is also a contributing author to the book “M&A Information Technology Best Practices.” Finally, at Deloitte Simon has helped build a world-class M&A IT practice with over 200 practitioners around the world and a rich set of accelerators and methodologies which are used by practitioners daily to deliver some of the largest transactions today.

Jay Spader is a Shareholder and member of the debt finance team at Denver-based Brownstein Hyatt Farber Schreck. He has extensive experience representing both borrowers and lenders in a wide variety of complex financing transactions. His experience includes all aspects of cash flow lending, asset-based lending and mezzanine finance. To date, his practice has primarily related to the financing of leveraged buyouts. Jay is an adjunct professor at the University of Colorado Law School teaching a class on leveraged finance. Additionally, he serves on the board of directors for the Colorado Enterprise Fund, the Executive Committee for the Metro Denver Economic Development Corporation and participated in the Denver Leadership Foundation's Access Denver (2014 graduate). Prior to joining Brownstein, he worked at Paul, Weiss, Rifkind, Wharton & Garrison, LLP and prior to that was with the law firm of Milbank, Tweed, Hadley & McCloy LLP.
Congratulations to Greg Thomas on being recognized as a 2017 M&A Advisor Emerging Leaders Award Winner.

Thank you for your outstanding contributions to our firm and the industry.

Our approach is to focus on building relationships with companies we believe in, relationships in which the value greatly exceeds the total of the transactions we’ve completed on our clients’ behalf.
Joe Sparacino is a Managing Director and Head of the BB&T Capital Markets Automotive Aftermarket Investment Banking group. With over 15 years of investment banking and corporate finance experience, he has provided mergers & acquisitions transaction advisory services to leading private equity groups and their portfolio companies, founder-owned companies, and public enterprises. Joe joined BB&T Capital Markets in 2011 and has advised dozens of companies in the automotive aftermarket and retail and consumer sectors during his tenure. Previously, Joe worked in investment banking at Harris Williams & Co. and Citigroup Global Markets. Prior to investment banking, he worked in the corporate strategy group at Textron, Inc. Mr. Sparacino received an MBA from the Fuqua School of Business at Duke University and a Bachelor of Science degree in finance from Boston College, where he graduated magna cum laude.

Jared Spitalnick is a Partner in Goodwin’s Private Equity Group. Jared specializes in advising private equity funds and their portfolio companies in large scale and middle-market transactions, including mergers, stock and asset acquisitions and divestitures, growth equity investments, venture capital investments, leveraged buyouts and leveraged recapitalizations, and majority and minority investments. Jared advises clients in various industries, including technology, healthcare, consumer products, telecommunications, education, manufacturing and media.

Gordon Spring is a Partner in Dentons’ corporate practice, concentrating on corporate matters ranging from the local representation of small businesses to the representation of private equity clients with a worldwide presence. The majority of Gordon’s time is spent representing strategic buyers and sellers in mergers and acquisitions, primarily in the micro and middle markets. He also serves as outside general counsel and a trusted advisor on a wide variety of business matters, including business formation and structuring, purchase and supply agreements, commercial lease agreements, loan agreements and employment agreements.

Matt Stewart is a Partner at King & Spalding and is a key leader in the growth of the firm’s West Coast M&A and private equity practice groups. He has advised on approximately 200 M&A and growth equity transactions, representing $30 billion in transaction value for several leading strategic acquirers and private equity and venture capital firms. Matt focuses his practice on the technology, media, telecommunications, and healthcare sectors. He advises private equity investors and private and publicly-traded companies on mergers and acquisitions (M&A), leveraged buyouts, growth equity investments, and financing transactions.

Shannon Stucky Pritchett is a Senior Managing Director at FTI Consulting and has more than a decade of experience in developing and executing communications strategies for companies announcing a restructuring, merger, acquisition or other type of transaction, as well as those seeking to manage their corporate reputation in relation to a specific issue or event. Ms. Stucky has advised clients including Aéropostale, Vertellus Specialties Inc., Hastings Entertainment, Vestis Retail Group, Hess, Noble Energy, Hercules Offshore, and many others. She also helped to launch Puerto Rico’s Public Corporation Debt Enforcement and Recovery Act. Ms. Stucky holds a Bachelor of Science in Journalism, magna cum laude, from Ohio University’s Honors Tutorial College.
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**Congratulations to Sanjay Patel, Bob Toma and all the other winners of the 8th Annual M&A Advisor Emerging Leaders Awards.**
Elliott Tapp is a Senior Associate at King & Spalding. Elliott practice focuses on representing public and private companies, as well as private equity funds, in connection with a wide variety of corporate and transactional matters. Prior to joining King and Spalding, Elliott was an associate at Cravath, Swaine & Moore and Schulte Roth & Zabel in New York, and a secondee to the Hong Kong office of a leading global investment firm focused on opportunistic investments. Elliott received his J.D. from the University of Virginia School of Law in 2008 and his B.A. in Philosophy and Political Science from Furman University in 2005, where he graduated summa cum laude and was inducted into Phi Beta Kappa. Elliott is admitted to practice law in the states of New York and Georgia.

Ervin Terwilliger is the Founder and Managing Partner of Three Twenty-One Capital Partners. Under Ervin’s leadership, Three Twenty-One Capital Partners has executed or advised greater than 140 clients in the past 10 years. Ervin manages all strategic initiatives concerning the firm’s portfolio of engagements, interacting directly with clients, investors and Three Twenty-One Capital Partners’ deal teams. Ervin has been a featured author, providing insight on industry sectors and the M&A landscape. Ervin sits on the Board of Directors for The Maryland Proton Therapy Center and has held Director positions for international manufacturing concerns, as well as interim C-level positions. Ervin graduated from the University of Delaware with a Bachelor’s of Science in Business Administration in Management and Marketing and is an active member of the ABI and TMA.

Greg Thomas is a Vice President in the Investment Banking group at D.A. Davidson & Co., where he focuses on transactions in the technology sector. Greg has over a decade of experience advising corporate clients on mergers and acquisitions, including domestic and cross-border transactions, as well as capital raises, including public and private offerings of both debt and equity. His transaction experience spans a range of emerging growth and middle-market industries; however, he has developed significant experience in the technology sector, including advising numerous companies in the SaaS, software, Internet and digital media, Cloud, semiconductors and IT service subsectors. Prior to joining D.A. Davidson in 2006, he spent several years with one of the Pacific Northwest’s largest. He holds a B.S., Magna Cum Laude, from Oregon State University in Business Administration with focuses in both Accounting and Finance.

Danielle Thorsen is a Managing Director in the Marketing and Business Development Group of Apollo Global Management. Danielle is responsible for leading fundraising efforts for Apollo’s private equity, credit and real assets businesses for the U.S.’s West Coast region. Prior to joining Apollo in 2008, Danielle was a member of the Capital Introduction Group at Bank of America. Previously, Danielle was with AIG Global Investment Group in the Private Equity Funds Group. Danielle began her career working for the Drug Czar at The White House. Danielle graduated from Virginia Tech with a B.S in Finance. Danielle currently serves on the board of Vitalere Investment Holdings LP and is on the investment committee for the board of trustees of the Pi Beta Phi Foundation.

Bryan Tolles is a Co-Founder & Managing Partner at Oakland Standard Co. Bryan gained experience as an investment banker, after College, then began his career in private equity. Bryan served as a vice president at Black Eagle Partners – the firm’s first non-partner hire. He led Black Eagle Partners to a striking 40 acquisitions during his tenure there. He was awarded a Crain’s Detroit 2011 M&A Award for “Dealmaker of the Year” for closing 13 transactions totaling more than $267 million in value. In December 2015, Bryan co-founded Oakland Standard Co., one of the most active investment groups in Michigan that targets entrepreneurial investors to stimulate the development of distribution and retail businesses in the industrial sector.
Robert J. Toma is a Managing Director in Raymond James’ Financial Services Investment Banking Practice. He has spent his entire 17-year career advising depository institutions on mergers & acquisitions, capital raising and strategic planning. Prior to joining Raymond James, he served as Managing Director and Head of Mutual-to-Stock Conversions at Sterne, Agee & Leach, Inc. where he helped initiate and grow the firm’s depository investment banking practice. Prior to joining Sterne Agee, Robert worked at Keefe, Bruyette & Woods and Tucker Anthony Sutro Capital Markets. He is originally from Cleveland, Ohio and graduated summa cum laude with honors in finance from The Ohio State University. He is a CFA charterholder and registered representative.

Shatara Troy is a Vice President at Harbor View Advisors and leads the firm’s consulting practice and manages sell-side and buy-side deal execution. In her role, she conducts strategic assessments, institutes client roadmaps to drive optimal exit opportunities and ensures successful transaction outcomes for clients. Prior to joining Harbor View, Shatara worked as a Registered Representative for Fidelity Investments and in the Audit Services practice at Deloitte & Touche. Shatara received a Bachelor of Business Administration, summa cum laude, and Master of Business Administration (MBA) from the University of North Florida. Outside of Harbor View, Shatara is passionate about mentorship and serves on the University of North Florida Women of Coggin committee.

Zachary Turke is a Corporate Partner in the Los Angeles headquarters of Sheppard, Mullin, Richter & Hampton, LLP. He specializes in advising public and private companies in the areas of mergers and acquisitions and joint ventures. Representing clients from around the globe, he works across a wide range of industries, including technology, manufacturing, private equity, aerospace and defense, food and beverage, entertainment, the Internet, real estate, automotive, construction, financial services and healthcare. In addition to M&A, he advises clients with respect to venture capital, corporate governance, corporate formation, securities, corporate finance and recapitalizations as well as general business matters. He is a graduate of Duke University and Harvard Law School.

David Van Wert is a Partner in RSM’s transaction advisory services practice, providing financial due diligence services to private equity investors, investment banking clients and corporations. David has more than 16 years of experience in business, many of those advising strategic and financial sellers and buyers on a range of M&A transactions. Prior to joining RSM, David spent time with PricewaterhouseCoopers LLP, LookSmart, and Intel. David received his bachelor’s degree in Finance and International Business from Penn State University.

Bart Walker is a Partner at McGuireWoods and concentrates on mergers, acquisitions and healthcare regulatory compliance. His practice includes advising healthcare providers as well as equity sponsors and lenders to the healthcare industry. Bart spearheaded the creation of McGuireWoods’ Southeast Healthcare Provider Conference. He represents lenders, borrowers and equity sponsors in various healthcare-related financing and acquisition transactions. He assists in the re-syndication and start-up of numerous ambulatory surgery centers and hospital-physician joint ventures. He regularly lectures and writes on transactional and regulatory issues affecting a wide range of healthcare businesses. While earning his law degree from the University of Notre Dame, Bart was named a White Scholar of the Thomas J. White Center on Law and Government. As an undergraduate, he was named a Morehead Scholar at the University of North Carolina at Chapel Hill.
Matthew Ward is a Senior Relationship Manager at SunTrust Bank. For the past 12 years, Matthew has been building relationships with law firms, acquisitive clients, private equity firms, venture capital, and others within the M&A community. Matthew works diligently with prospective clients and counsel to effectively onboard deal parties in accordance with the US PATRIOT Act, negotiate deal documents, ensure proper tax reporting of payments, effectuate trade and security settlements, and execute on purchase price adjustments, indemnification claims and other items critical to a transaction. Matthew not only manages the bank’s high profile M&A transactions, he also has extensive background supporting Regulatory escrow needs, EB-5 Immigrant Investor Program, and 1031 Like Kind Exchanges.

Joseph Weissglass is a Vice President at Guggenheim Partners. Prior to joining Guggenheim, Joseph was an Associate in the Global Restructuring and Finance Group at Barclays Capital. Joseph works primarily with middle market clients, focusing on M&A and restructuring advisory as well as private capital raise/financing assignments. Joseph has completed a variety of transactions, including both in- and out-of-court restructurings, acquisitions, recapitalizations, and debt and equity financings. Joseph graduated with a B.S. from Clemson University and with an MBA from the University of North Carolina Kenan-Flagler Business School. He is a FINRA General Securities Representative (Series 63, 79) a Chartered Insolvency and Restructuring Advisor (CIRA-P) and holds his Certification in Distressed Business Valuation (CDBV-P).

Eric Welchko is a Managing Director at Ravinia Capital. Eric has worked in corporate finance since 2004 when he joined Wells Fargo as a senior credit manager. He next worked in business development in the financial services group at GES Associates before taking a position at Accuval Associates as a senior analyst, a position he held until 2012. With his business finance acumen, growing reputation and strong emotional intelligence, he was hired by Tom Goldblatt at Ravinia Capital to help drive the fledgling company’s growth. In addition, he is a noted speaker and author on structuring complex deals involving distressed companies. Eric joined the Commercial Finance Association’s Midwest Chapter, rising to president in 2017. Eric received his BS from Illinois State University in finance, with a minor in economics.

Mike Wilkin is a Principal in Deloitte Consulting’s M&A practice. In this role he works with a diverse set of multinational clients within Life Sciences & Healthcare, Consumer Products, and Technology, providing insight with broad experience in deal strategy, post-merger integration, and divestiture management. He has over 16 years experience in consulting and industry, and has served in leadership roles on deals ranging in size from $200 million to $68 billion. Mike joined Deloitte in 2004 and his experience spans the deal lifecycle, including strategy development, operational due diligence, and global integration and divestiture management. He has extensive experience in cross-border and global transactions. Mike is a graduate of St. Joseph’s University in Philadelphia, PA.

Christian Wilson is a Partner in Goodwin’s Private Equity Group. Chris specializes in advising private equity sponsors and their portfolio companies in a wide variety of transactions, including leveraged buyouts, mergers and acquisitions, recapitalizations, growth equity investments, strategic transactions, joint ventures and general corporate matters. Chris also frequently represents management teams and operating executives in sale transactions. Chris focuses his practice on transactions in the healthcare, financial services/asset management, consumer, business services, technology companies and manufacturing verticals. Chris also serves as a leader of Goodwin’s committee on racial and ethnic diversity in Boston and is deeply involved in Goodwin’s diversity and inclusion efforts.
Casey Winters is a Managing Director in KPMG LLP’s Financial Due Diligence practice based out of Los Angeles, California. He has over fourteen years of public accounting and consulting experience across several industries, including retail, consumer goods, manufacturing, internet, and industrial goods. He offers considerable expertise in buy-side and sell-side financial due diligence services to private equity investors and strategic buyers. He has advised clients in more than 200 transactions ranging from $20 million to $28 billion, including international transactions throughout North America, Europe, Asia, Australia, and the Middle East. Education, licenses and certifications: BS, Miami University Certified Public Accountant (CPA) licensed in California.

Cristiane R. Wolfe is a Partner at Dentons, focusing on providing corporate and transactional counsel to public and private companies in the middle market in a variety of industries. A strong believer in giving back, Crissy also co-founded The Service Council for the Atlanta Legal Aid Society. She also currently serves on the Atlanta Legal Aid Society Board. Crissy is a mother of two beautiful children and loving wife. In her limited spare time, Crissy likes to travel and hike with family and friends.

Bradley H. “Brad” Wood is a Shareholder in Maynard Cooper & Gale’s Corporate Securities & Tax Practice and serves as Chair of the firm’s M&A/Private Equity & Venture Capital Practice Group. Brad counsels a wide variety of companies, including public and private operating companies, private equity and venture capital funds, and family offices. While he represents companies of all types and sizes, he has developed particular expertise in middle-market private company transactions on both the buy- and sell-side, having closed in excess of 75 transactions during his 12 years of experience. Brad advises clients through mergers and acquisitions, as well as a broad range of other strategic transaction structures. He earned his J.D. from Vanderbilt University School of Law and holds a M.Acc. and B.S. from Samford University.

Melanie Yermack is a Vice President in Mesirow Financial’s Investment Banking group. Melanie is responsible for leading the day-to-day transaction execution process across a wide range of industries, including plastics and packaging, industrials, aerospace and defense, transportation and logistics and business services, among others. Prior to joining Mesirow as an investment banking associate in 2011, Melanie was a Manager in the Transaction Services division at PricewaterhouseCoopers. Melanie earned a BS from the University of Illinois College of Business, where she graduated with high honors. Melanie is a Certified Public Accountant (CPA). She holds a FINRA Series 79 license. Melanie serves as a member of the Next Generation Associate Board for the United States Holocaust Memorial Museum Council.

Anupama “Anu” Yerramalli is a Special Counsel in the Corporate Restructuring & Bankruptcy practice at Kramer Levin Naftalis & Frankel. Anu has been involved in some of the most complex and multifaceted bankruptcies and restructurings across a diverse range of industries including health care, shipping, telecommunications, manufacturing and retail. Anu is a well-regarded advocate representing a broad range of clients, including debtors, official committees, bondholders and other investors, in Chapter 11 and Chapter 9 bankruptcy cases, out-of-court restructurings and other distressed situations. Recognized by Super Lawyers in 2013-2016 and as a Rising Star in 2011-2012, Anu represents clients in all facets of restructurings, including motion practice and confirmation hearings in court and transaction negotiation such as sales and balance sheet deleveraging.
Zoe Zhou is a Marketing Manager at S&P Global Market Intelligence. She defines and leads integrated go-to-market strategies for Corporate Development, Professional Services and Treasury audiences. She identifies market opportunities and develops targeted campaigns that differentiate the company’s products in Americas and EMEA regions. Zoe joined the firm in 2013 and is currently looking after a team based both in New York and London. Prior to joining S&P Global Market Intelligence, Zoe spent 3 years as an Assurance Associate at PwC. Zoe holds a B.B.A in Accounting from the Isenberg School of Management at University of Massachusetts Amherst.

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Kramer Levin congratulates our very own Anupama Yerramalli for being recognized as one of M&A Advisor’s emerging leaders.

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