Event Program

and

Panelist Biographies

September 22 - 23, 2016
Thursday, September 22

Keynote Address, Miller Hall, Brinkley Commons (2nd floor)
5:45 pm – 7:00 pm

Craig W. Broderick is Goldman Sachs’ Chief Risk Officer, responsible for credit, market and operational risk, model risk, independent liquidity risk, and insurance. Mr. Broderick is co-chair of the Firmwide Risk Committee. Mr. Broderick serves as a member of the Management Committee, the Firmwide Capital Committee, and the Firmwide Suitability Committee. Previously, Mr. Broderick was Chief Credit Officer until 2008. Prior to that, he was the manager of the European Credit effort based in London from 1986 to 1999. Mr. Broderick joined Goldman Sachs in 1985 in the Credit Department in New York. He was named Managing Director in 1998 and Partner in 2000. Prior to joining the firm, Mr. Broderick worked at Chase Manhattan Bank. Mr. Broderick is the chair of William & Mary's Investments Committee, serves on its Audit Committee, and is a member of the College's Board of Trustees. Mr. Broderick earned a BA in Economics from William & Mary in 1981. His wife Camille is also a William & Mary graduate, and one of his two sons has just graduated from the College.

Craig W. Broderick
Chief Risk Officer
Goldman Sachs

Friday, September 23

Opening Sessions: Brinkley Commons, Continental Breakfast Provided
8:00 am – 9:15 am Intro to Financial Services
9:30 am – 10:45 am Investment Banking

Concurrent Sessions: See Insert for Room Numbers
11:05 am – 12:05 pm Session 1 - Asset Management
Session 2 - Equity Analysis (required for BUAD 421 students)
Session 3 - Fin Tech/Quantitative Finance
Session 4 - Strategy Consulting

12:25 pm – 1:25 pm Session 1 - Private Equity & Venture Capital
Session 2 - Risk
Session 3 - Private Banking
Session 4 - Corporate Finance

Lunch and Networking with Panelists: Brinkley Commons and Atrium
1:30 pm – 3:30 pm Coffee and Networking
Karim Ahamed is a senior investment advisor and member of the investment committee at HPM Partners LLC, a leading SEC-registered investment advisory firm. In addition to his client responsibilities, Mr. Ahamed serves as investment strategist, working with the Chief Investment Officer to identify key investment themes and to develop and implement the firm’s strategic and tactical positioning for managing client portfolios. Mr. Ahamed also oversees HPM Partners’ investment manager selection activities and authors the firm’s quarterly market outlook on behalf of the investment committee. Prior to joining HPM Partners, Mr. Ahamed was a managing director and senior investment specialist with J.P. Morgan Private Banking. Earlier in his career, Mr. Ahamed held senior investment and wealth management positions with Coutts & Co and UBS AG in the UK. He received his BA from William & Mary and his Master of Management degree from the Kellogg School of Management at Northwestern University. He is a CFA charterholder and member of the CFA Institute, CFA Society of Chicago, and CFA Society of the UK. In addition to his work with the Mason School of Business, Mr. Ahamed is a member of the Wealth Management Advisory Board at DePaul University in Chicago, and a regular guest lecturer at the undergraduate and graduate levels.

Daniel Barzach is an Associate at Apollo Global Management, an investment firm in New York, where he specializes in leveraged buyouts and distressed debt investments. Prior to joining Apollo, Mr. Barzach was an Analyst in Morgan Stanley’s Mergers & Acquisitions department in New York. Mr. Barzach is also a Co-Founder of Jonathan’s Dream Reimagined and Mentor with the TEAK Fellowship. Mr. Barzach grew up in West Hartford, CT and graduated Summa Cum Laude with a BBA in Finance from William & Mary. While on campus, Mr. Barzach served as President of both the Howard J. Busbee Finance Academy and the Mason Investment Club.

David Braun is the CEO of Capstone Strategic, Inc., which he founded in 1995 to meet the unique demands of mid-market companies and their corporate growth initiatives. The firm’s clients include Fortune 500 and multinational companies as well as small and family-owned businesses. Mr. Braun has over 25 years of experience formulating growth strategies in a wide range of manufacturing and service industries. He is the author of Successful Acquisitions: A Proven Plan for Growth and founder of the blog www.SuccessfulAcquisitions.net. As a Mergers & Acquisitions expert he has published numerous articles and has been featured in various media outlets including Fox Business News, CBS MoneyWatch, the Financial Times, and CNN Money. Mr. Braun regularly speaks for Vistage International and the American Management Association and presents his highly regarded seminars at national and regional events. Mr. Braun received his BBA from William & Mary, where he met his wife, Karen ’87, who majored in Anthropology and Spanish. Their two daughters are students at William & Mary. Krista, a senior majoring in chemistry and mathematics and Ingrid, a sophomore.
Mark Bush '91
Bank of America Merrill Lynch

Mark Bush has over 25 years of experience in investment banking and currently serves as Chairman for Bank of America Merrill Lynch's Global TMT Group. Mr. Bush has specialized in the Technology, Telecommunications, and Media sectors throughout his banking career, and over the years he has held various leadership posts in the firm. Mr. Bush has many notable Mergers & Acquisitions transactions, including advising Charter on its $79 billion purchase of Time Warner Cable, advising Windstream on its spin of its network assets into CS&L, advising Level 3 on its $7.3 billion acquisition of TW Telecom, the $2.5 billion sale of PaeTec Communications, and the $27.5 billion LBO of Alltel. Mr. Bush received his MBA from Columbia Business School where he was a member of Beta Gamma Sigma and his BA from William & Mary. Mr. Bush is married and lives in Summit, NJ with his wife, Kristin, and three children.

Dabney Carr '14
BB&T Capital Markets

Dabney "Quint" Carr is an Analyst in the Investment Banking Division of BB&T Capital Markets. After earning his BA in Economics with a double major in Finance from William & Mary in 2014, Mr. Carr joined BB&T Capital Markets Investment Banking program in July. Since then, Mr. Carr has worked on a variety of sell-side Mergers & Acquisitions transactions, focusing mostly on the Commercial & Industrial and Logistics & Transportation Sectors.

Neal Chhabra '14
Morgan Stanley

Neal Chhabra is an Investment Banking Analyst in Morgan Stanley's Mergers & Acquisitions Department. Prior to joining Morgan Stanley, Mr. Chhabra worked as an Investment Banking Analyst in Deutsche Bank's Mergers & Acquisitions Group. In these roles, Mr. Chhabra has advised clients on mergers, acquisitions, divestitures, and other strategic alternatives across industries including consumer, retail, chemicals, healthcare, transportation, and media. Mr. Chhabra graduated from William & Mary in 2014 where he majored in Finance and Government. While at William & Mary, Mr. Chhabra was a vice president of the Finance Academy, received the Julie R. Agnew '91 Distinguished Service Award for his service to the Finance Academy and the Benjamin Stoddert Ewell Award for his service and contributions to the broader campus community.
Niles Chura ’91
CRG

Mr. Chura is a seasoned credit investment professional with a demonstrated ability to recognize value and develop and execute strategies. Before joining CRG, Mr. Chura founded and led Ouray Capital, a boutique advisory business. Previously, Mr. Chura was the top-ranked Portfolio Manager at Highland Capital Management, L.P., at the time one of the largest alternative credit managers in the U.S., where he generated mid-double digit returns providing research coverage of a large portfolio of leveraged loans, high yield bonds, and equities. Mr. Chura's other professional experiences include working on numerous financial restructures as part of the loan portfolio management group at Bank of America, and conducting budgeting, transfer pricing, and cost analysis as a member of the finance & planning group at a large U.S. corporation. Mr. Chura was also a field artillery officer in the U.S. Army and served overseas for 3.5 years. Mr. Chura received an MBA with a Finance concentration from Yale University and a BA in Economics with a double major in Government from William & Mary.

Alex Comerford ’14
Centerview Partners

Ms. Comerford is an Investment Banking Analyst at Centerview Partners focused on mergers and acquisitions and strategic advisory across a range of sectors. Ms. Comerford graduated Magna Cum Laude from the College in 2014 with a BBA in Finance with an international emphasis and a double major in Chinese.

Katherine Covino ’12
Deloitte Advisory

Katherine Covino is a Senior Consultant in Deloitte Advisory's Corporate Restructuring Group (CRG). The CRG practice works with organizations in financial and operational transformation or crisis (distress, bankruptcy, etc.) to create opportunities for stabilization and growth and guide them through a change in performance or crisis. Ms. Covino specializes in working with pensions of distressed companies and labor unions. Ms. Covino also provides operational consulting support to the corporate finance department of a regulatory federal agency. Prior to joining CRG, Ms. Covino was in Deloitte's Regulatory, Forensics, and Compliance practice. In this practice, Ms. Covino worked on engagements in the areas of forensic accounting, anti-money laundering, commercial due diligence research, and start-up loan application reviews. Ms. Covino continues to manage a compliance engagement for a former regulatory client in this practice. Ms. Covino graduated from William & Mary with a BBA in Accounting with a Finance concentration, and is a CPA and PMP. Ms. Covino was on the Finance Academy board as a student and currently serves as a board member and the treasurer for William & Mary's Washington, D.C. alumni chapter.
Matthew Crisafi '13, MAcc '14
Stephens Inc.

Matthew Crisafi is a Senior Investment Banking Analyst in Stephens' Industrial Distribution & Services practice. After earning his BBA from William & Mary in 2013 with a major in Finance and a concentration in Accounting, Mr. Crisafi returned for the MAcc program and to finish his red-shirt senior football season. Following that, Mr. Crisafi joined Stephens' analyst program in the firm's Atlanta office. During that two-year generalist program, Mr. Crisafi provided execution support on Mergers & Acquisitions and capital markets transactions for the Specialty Finance and Industrial Distribution & Services groups. Most recently, Mr. Crisafi has worked as a dedicated resource to the ID&S practice.

Debra Deihl ’91
Ferguson Enterprises

Debra Deihl serves as Vice President of Financial Services at Ferguson Enterprises, the largest wholesale distributor of residential and commercial plumbing supplies and pipe, valves, and fittings in the U.S. Ms. Deihl is responsible for credit risk management for more than $14 billion in annual sales and leads a team of over 350 credit associates across the country. Ms. Deihl joined Ferguson in 1999 as Manager of East Coast Shared Accounting. She was promoted to Director of Shared Services in 2005. While managing Shared Services, Ms. Deihl implemented flexible work arrangements that resulted in record-high retention rates and established a partnership with Thomas Nelson Community College that led to hundreds of associates receiving professional certificates and Associate degrees. Prior to her current role, Ms. Deihl served as the Senior Director of Shared Services for one year. Prior to joining Ferguson, Ms. Deihl worked in public accounting and for Newport News Shipbuilding. A graduate of William & Mary, Ms. Deihl was selected to participate in a leadership program at the University of Virginia.

Alice Davison P’16
Capital Group

Alice Davison is a Vice President and Senior Manager of talent acquisition at Capital Group (a Los Angeles-based investment management firm) where she focuses on global investment group recruiting. She has 28 years of industry experience, all with Capital Group. Earlier in her career at Capital, Ms. Davison worked as a Human Resources Manager, as a Fund Administrator and Consultant for Capital Research International, and as the Manager of The Associates Program (TAP), a two-year series of work assignments in various areas of the organization. Ms. Davison was also a TAP participant. Ms. Davison holds an MBA with distinction from the Stern School of Business at New York University and a BA in Economics from Bowdoin College. Ms. Davison is an active volunteer for William & Mary (P’16), NJSeeds, and Grameen Foundation. She serves on the board of Forté Foundation, and is a former trustee of Far Brook School (NJ). Ms. Davis now lives in Summit, NJ and works in New York.
Brij Dhanda ’16
McKinsey & Company

Brij Dhanda is a Business Analyst at McKinsey & Company. Mr. Dhanda graduated in 2016, earning his BBA in Finance with a concentration in Entrepreneurship. Mr. Dhanda is currently serving on a project in the retail space and will go on to serve a wide array of industries throughout his tenure at McKinsey. During his time at William & Mary, Mr. Dhanda co-founded multiple companies including a digital marketing agency and an international nonprofit which distributed skin care products.

Abbey Doski ’16
Bain & Company

Abbey Doski is an Associate Consultant with Bain & Company based out of the Atlanta office. As an Associate Consultant, Ms. Doski works with a team to drive the creation of innovative and strategic solutions for her clients. On her current case, Ms. Doski is working on division stratification for a large packaging company to increase operational efficiency, capitalize on growth opportunities, and reduce overhead costs. During her time at William & Mary, Ms. Doski was involved with the Howard J. Busbee Finance Academy and Women in Business Club, and was a post-baccalaureate fellow for the Boehly Center in the Spring of 2016.

Theresa Dugan ’14
JP Morgan

Theresa Dugan is an analyst at J.P. Morgan Private Bank in New York. After earning her BA in Economics and Finance from William & Mary in 2014, Ms. Dugan joined the Private Bank’s three-year analyst program as a banking analyst. In this role, Ms. Dugan assisted on investment and wealth planning strategies for high-net worth families, endowments, and foundations. In the summer of 2016, Ms. Dugan transitioned to the role of investor analyst, where she helps to formulate and implement investment strategies for clients. During her time at William & Mary, Ms. Dugan was an executive board member of Chi Omega and the Howard J. Busbee Finance Academy.

Rob Franklin ’09
Bain & Company

Rob Franklin is a Consultant with Bain & Company based out of their Chicago office. After earning his BBA in Finance from William & Mary in 2009 with a double major in Chinese. Mr. Franklin spent a year living in Hunan province working as an English teacher as part of the WorldTeach program. Following his year teaching, Mr. Franklin moved to Beijing where he worked as an Analyst with Gao Fei Consulting Services and conducted due diligence and field investigations for U.S. listed Chinese companies. Following his time abroad, Mr. Franklin returned to the U.S. to pursue an MBA at the Tuck School of Business at Dartmouth. Mr. Franklin recently graduated from Tuck in 2015 and has since been working at Bain & Co. In his time at Bain & Co., Mr. Franklin has worked on a number of cases including performance improvement efforts at a leading technology firm as well as developing a transformational growth strategy for a REIT.
Becca Gildea ’12
Ernst & Young

Rebecca Gildea, CPA, is a Senior Financial Risk Management Consultant in Ernst & Young’s (EY) Financial Services Office. After earning her BBA from William & Mary in 2012 with a major in Accounting and a concentration in Finance, Ms. Gildea joined EY’s Business Advisor Program based out of New York City. During that three-year semi-rotational program, Ms. Gildea worked on varying risk management engagements, including CMBS transaction issuance and interpretation/implementation of liquidity regulatory requirements. Most recently, Ms. Gildea has aligned out of the BAP program into EY’s Treasury and Liquidity Risk Management practice. Since aligning, Ms. Gildea has been working to help a client create a global solution to liquidity risk management, including working with front office traders to advise on and develop global liquidity stress model assumptions, and working to reduce entity liquidity risk by restructuring the firm’s governance and funding model.

Will Glass ’07
Perella Weinberg Partners

Will Glass has nine years of corporate finance experience across industries and products including Mergers & Acquisitions, private capital, public capital, restructuring, hostile defense, and strategic advisory. Though he currently focuses on medical devices and healthcare IT, Mr. Glass has worked on transactions in technology, media, telecom, video gaming, agriculture, shipping, industrials, energy, insurance, banks, asset managers, broker dealers, consumer products, and specialty lending with transaction sizes ranging from $15mm to $50bn+ including Medtronic’s $42.9 billion acquisition of Covidien. Mr. Glass has completed transactions in the United States, United Kingdom, Canada, Switzerland, Ireland, Netherlands, Thailand, Indonesia, Argentina, Mexico, Colombia, Poland, Hong Kong, Philippines, Israel, and Taiwan.

Rick Hartmann III ’08
Gen Re

Rick Hartmann III is a Treaty Account Executive in Gen Re’s Stamford, CT office. Mr. Hartmann joined Gen Re, a subsidiary of Berkshire Hathaway, in 2008 as a property facultative underwriter in Gen Re’s Philadelphia office. He currently develops property/casualty portfolio risk transfer solutions between insurance companies and Gen Re. Mr. Hartmann's primary focus is exploring how companies can profitably expand their existing business, improve underwriting results, limit operational and legal risks, and prepare for emerging issues. Mr. Hartmann routinely speaks on various reinsurance topics, is a member of the Young Insurance Professional Group and a mentor to incoming trainees. Mr. Hartmann holds a BA in Government from William & Mary and an Associate in Reinsurance designation, and is actively pursuing his CPCU designation.
Hope Johnson ’14  
*Boston Consulting Group*

Hope Johnson joined the Boston Consulting Group in January 2015 as an Associate in their Washington, D.C. office and works closely with organizations to create innovative solutions across a wide range of business areas. Ms. Johnson initially worked for a large healthcare company optimizing their vendor call centers and identifying incremental efficiencies while more recently has focused on a large cultural transformation at a retailer working to improve both the customer shopping experience and the working environment of their employees. Ms. Johnson's role requires constant interaction with senior level clients, thoughtful presentation and communication skills, and a strong grasp of quantitative analyses. Ms. Johnson interned with J.P. Morgan Private Bank in New York City for the summer of 2013 working as an analyst for ultra-high net worth clients and with Standard Chartered in London for the summer of 2012 in Corporate Finance. Ms. Johnson double majored in Mathematics and Finance at William & Mary and represented the College as a D1 tennis player all four years.

Klaudia Kasztelaniec ’09  
*McKinsey & Company*

Klaudia Kasztelaniec is a Senior Associate at McKinsey & Company. In her role, Ms. Kasztelaniec advises large private companies across a range of industries on sales & marketing related topics. Ms. Kasztelaniec earned her BA in Economics with a double major in Finance from William & Mary and an MBA from Stanford Graduate School of Business. Ms. Kasztelaniec was a member of the varsity tennis team at William and Mary.

Eric Kauders ’91  
*US Trust*

Eric Kauders is a Managing Director and the Trust Executive for the Mid-Atlantic Market of U.S. Trust, Bank of America Private Wealth Management, where he is responsible for leading a team of professionals to deliver fiduciary and wealth structuring guidance and services to high net worth and ultra-high net worth individuals and their families. Mr. Kauders joined Bank of America in 2000 as Assistant General Counsel. In December 2005, Mr. Kauders became a Trust Team Leader for the Virginia Market, and was promoted to Market Trust Executive for Virginia in 2008 and his current position in 2009. Before joining the company, Mr. Kauders was an attorney with McGuireWoods, a law firm with offices worldwide. Mr. Kauders graduated with High Honors from William & Mary, where he majored in both Public Policy and Government. After graduating, Mr. Kauders served as a Governor's Fellow in the Cabinet of Virginia Governor L. Douglas Wilder. Mr. Kauders then earned a law degree from University of Virginia’s School of Law, where he was a member of the Virginia Law Review. Mr. Kauders is chairman of the board of the Virginia Council on Economic Education, and is on the boards of The Windsor Foundation, The Gwathmey Foundation, The Jeffress Foundation, and The Loughran Foundation. Mr. Kauders is also a member of the Virginia State Bar.
**Alex Kocher ’12**  
*Global Endowment Management*

Alex Kocher is a Senior Analyst on the Public Investments Team at Global Endowment Management (GEM), an outsourced CIO that manages ~$7.5 billion for an institutional client base and was founded by a team from the Duke University and Duke Endowments. At GEM, Mr. Kocher is responsible for coverage of the public equity and hedge fund portfolios as well as sourcing new investments across a number of alternative asset classes. Prior to joining Global Endowment in July 2014, Mr. Kocher was an Investment Banking Analyst in Jefferies’ Consumer and Retail group where he was involved in a number of equity and debt financings with a focus on the restaurant sector. Mr. Kocher graduated from William & Mary in 2012 with a BBA in Finance and a double major in International Relations. Mr. Kocher is a CFA Level III candidate.

**John Leone ’91**  
*Stevens Capital*

John Leone is primarily responsible for Stevens Capital’s direct access to global stock exchanges, equity finance, and management of counterparty relationships. Mr. Leone has over 25 years of experience in global trading and has spent his entire career with either Stevens Capital or its associated companies and predecessors. Mr. Leone has additional experience trading energy products and foreign exchange. Current professional associations include: The New York Stock Exchange Institutional Traders Advisory Committee, William & Mary Finance Academy, BATS Global Stock Exchange Institutional Advisory Committee, The NASDAQ Stock Exchange Quality of Markets Committee, and Investment Company Institute Working Group Market Structure and Investor Confidence. Mr. Leone holds a BA degree in economics from William & Mary, is a CFA Institute Charterholder, and recipient of the Howard J. Busbee Finance Academy Alumni Award.

**Chris Maher ’79**  
*Ernst & Young*

Chris Maher is a Principal within the Risk Advisory Services group of Ernst & Young’s (EY) New York Financial Services Office. Mr. Maher has more than 30 years of relevant industry experience advising financial services firms including asset management firms, banking organizations, investment banks, broker-dealers, and insurance companies. Recently, Mr. Maher’s primary area of focus has been advising clients regarding the Dodd-Frank Wall Street Reform and Consumer Protection Act. Mr. Maher also provides on-call advisory services to address regulatory issues in connection with mergers and acquisitions, securitizations, derivative transactions, tax-based structures, and in general consultations. Mr. Maher joined Ernst & Young in 1993 after 13 years at the Federal Reserve, where he left as a team leader in examinations. At the Federal Reserve, Mr. Maher managed examinations of bank holding companies and international banking organizations. Mr. Maher was also involved in a number of initiatives for the Board of Governors of the Federal Reserve System to enhance examiner training and to develop the U.S. Foreign Banking Organization (FBO) program. Mr. Maher served as an advisor on bank supervision for the International Monetary Fund on a technical assistance mission to the State Central Bank of Turkmenistan. Mr. Maher earned his BBA in Accounting from William & Mary.
**Tom Mayrhofer ’95**  
*The Carlyle Group*

Tom Mayrhofer is a Partner and Managing Director of The Carlyle Group. In addition to holding the position of Chief Financial Officer of Carlyle's Corporate Private Equity Segment, Mr. Mayrhofer oversees the operations of all of Carlyle's Private Equity funds and serves on the Investment Committee for Carlyle's Buyout and Growth Capital funds. Prior to joining Carlyle, Mr. Mayrhofer worked at Arthur Anderson LLP in the Real Estate and Hospitality Group; he has been with Carlyle since 2000. Mr. Mayrhofer graduated from William & Mary with a BBA in Accounting and is based in Washington, D.C. Mr. Mayrhofer, his wife, Leigh Gayton Mayrhofer, and their two children live in Arlington, VA.

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**Ed McGann ’82**  
*Bank of New York Mellon*

Ed McGann is globally responsible for the FX Services businesses in BNY Mellon Markets providing products and services to support clients’ currency hedging, custody-based foreign exchange and multicurrency payments. Mr. McGann and his team develop and execute on the strategic business and product plan for FX Services. Prior to joining Markets, Mr. McGann was the Head of BNY Mellon's Asset Servicing Product Management for Global Financial Institutions and International Markets responsible for ensuring that the suite of products and services offered met the clients' needs as well as developing future product offerings. Prior to The Bank of New York and Mellon Financial Corporation's merger, Mr. McGann was the head of U.S. Financial Institutions Relationship Management Division. Mr. McGann also has worked at The Chase Manhattan Bank and U.S. Trust Company of New York. Mr. McGann received a BA in Economics from William & Mary in 1982 and an MBA in finance from New York University in 1986.

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**Greg Melich ’92**  
*Evercore ISI*

Greg Melich is a Senior Managing Director, Head of Evercore ISI's Consumer Research Team, and a Senior Equity Research Analyst covering Retail Hardlines & Broadlines and other industry-related stocks. Mr. Melich was most recently ranked #1 in Institutional Investor magazine for Retail Hardlines 2012 - 2015. Prior to joining Evercore ISI, Mr. Melich spent 16 years at Morgan Stanley in consumer-related research, nine of which were as Managing Director. Over seven years, he built Morgan Stanley's European auto research effort, and was ranked #1 Auto Analyst in Institutional Investor for three of those years. Mr. Melich returned to the U.S. in 2003 to head Morgan Stanley's Global Retail Research Team. Mr. Melich graduated from William & Mary in 1992 and is a CFA charterholder.
Steve Mellas P’18  
*AQR*

Steve Mellas has 30 years of management experience in some of the most prestigious firms on Wall Street. Mr. Mellas currently serves as a Principal at AQR Capital Management, an independently owned investment firm where he oversees firm-wide operations, client administration, and project management. In this role, Mr. Mellas has worked within the firm and its clients to introduce innovative training programs such as Intro to Design Thinking and Lessons from NASA. In addition to his responsibilities at AQR, Mr. Mellas is a faculty member of NYU’s Stern School of Business. In the fall of 2005, Mr. Mellas joined the faculty as an adjunct professor where he co-created and launched the course Advanced Topics in Management Communication: Persuasive Strategies and Tactics throughout Your Career. Prior to joining AQR, Mr. Mellas was a Managing Director at Goldman Sachs & Co., where he was responsible for the Investment Management Division's asset management operations worldwide. Preceding Goldman Sachs, Mr. Mellas managed fixed-income trading operations at Morgan Stanley. Mr. Mellas earned an MBA from Pace University and a BA in Economics from Villanova University.

Elena Painter ’14  
*Battery Ventures*

Elena Painter is a venture investor at Battery Ventures, focused on early stage SaaS opportunities. Ms. Painter is currently working full-time for a Battery portfolio company, Gainsight, in a business operations role. This includes working with different business units (customer success, sales, services, product, etc.), analyzing data, and designing new processes to increase efficiency while scaling the business. Prior to Battery and Gainsight, Ms. Painter worked at Goldman Sachs as an investment banking analyst in the Technology Media Telecom (TMT) group. Within TMT, Ms. Painter helped advise software and consumer internet companies on mergers and acquisitions and financings. Ms. Painter graduated from William & Mary, Summa Cum Laude.

Thomas Lee Rice ’15  
*Harris Williams*

Mr. Rice joined Harris Williams & Co. in 2015 and is a member of the firm’s Energy, Power & Infrastructure group. He has worked on transactions across the energy, power & infrastructure space. Within energy and power, Mr. Rice has experience working with businesses specializing in infrastructure and industrial services. Prior to joining Harris Williams & Co., Mr. Rice worked at MFS Investment Management in Boston as a Summer Associate in the industrials group. Mr. Rice earned a BBA in Finance from William & Mary, where he graduated Magna Cum Laude.
Philip Roane ’06
Centerview Partners

Philip Roane works at Centerview Partners in New York. Previously, he held roles in investment banking and private equity. Mr. Roane received a BA in Economics with a double major in Finance from William & Mary, where he was a cofounder of the Finance Academy, and an MBA from Harvard Business School.

Harrison Roday ’14
American Industrial Partners

Harrison Roday is an Associate at American Industrial Partners. AIP is a group of engineering-centric operating and investment professionals focused on American companies in the industrial economy. The firm’s mantra is "leading by serving" - providing resources to enable management to focus on business fundamentals over the long-term. AIP has $3.2 billion of assets under management on behalf of leading pension, endowment, and financial institutions. Prior to joining AIP, Mr. Roday worked as an Analyst in the Global Industrials Group at Morgan Stanley. In 2012, he was the Advance Director for Kaine for Virginia. Mr. Roday grew up in Richmond, VA and currently resides in New York City. He graduated Magna Cum Laude from William & Mary after double majoring in Government and Finance with a concentration in Accounting. While at the Business School, Mr. Roday was an officer in the Howard J. Busbee Finance Academy and was President of the Mason Investment Club.

Colin Ruh ’89, MBA ’94
Capital One

Colin Ruh is Senior Vice President & Chief Financial Officer for Line of Business Finance and has been with Capital One since 1994. Mr. Ruh has seven years’ experience leading marketing initiatives within the credit card business; two years as business line CFO for Diversified Lending businesses: Small Business, Canada, Credit Recovery Services (CRS) and Card Partnerships; three years managing Corporate Planning for COF including leading the corporate planning process, managing the corporate P&L, and leading funds transfer pricing and cost allocations; and two years as the CFO of Capital One's Auto and Home Loan businesses. Presently, Mr. Ruh serves as the CFO for Capital One's Line of Businesses with responsibility for Card, Auto, Home Loans, Commercial and Retail, and Direct Banking. Mr. Ruh also serves as the executive sponsor for the Global Finance Manager Leadership Program. A native of Virginia, Mr. Ruh earned a BA in Economics with a double major in Government and a MBA from William & Mary. Mr. Ruh is married with three children and currently resides in Richmond, Virginia.
**Jason Sibley ’01**
*Flare Capital Partners*

Jason Sibley is a Principal at Flare Capital Partners. Mr. Sibley joined the Flare team with more than a decade of venture and private equity investing experience. Flare Capital Partners provides venture capital for early stage and emerging growth healthcare technology companies, partnering with the most creative and passionate entrepreneurs looking to reinvent the business of healthcare. Prior to joining Flare Capital, Mr. Sibley was a Director at GE Ventures, a leading corporate venture capital firm focused on healthcare, energy, and advanced manufacturing technology. At GE Ventures, Mr. Sibley led many numerous healthcare technology investments and also led GE's digital health partnership with StartUp Health and the New York City Early Stage Life Science Co-Investment Program. Previously, Mr. Sibley was a Vice President at Gleacher Partners, Senior Associate at American Capital, and Associate at Morgenthaler Partners. Mr. Sibley began his career as an Investment Banking Analyst with Wells Fargo (First Union/Wachovia). He received his undergraduate BBA degree in Finance with a secondary concentration in History from William & Mary in 2001.

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**Conor Sapp ’15**
*Stephens Inc.*

Conor Sapp is an Analyst in Stephens Inc.’s Investment Banking Division. After earning his BBA from William & Mary in 2015 with a major in Finance, Mr. Sapp joined Stephens Inc. based out of their headquarters in Little Rock, AR. Mr. Sapp has worked on a variety of advisory engagements including mergers and acquisitions, leveraged buyouts, public equity raises, and private placement transactions.

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**David Shoulders ’04**
*Matrix*

David Shoulders has 12 years of financial and merger and acquisition advisory experience and has managed a variety of transactions with privately-held, middle-market companies since joining Matrix in 2006. These transactions primarily include sell-side strategic advisory assignments and private placements of debt and equity. Prior to joining Matrix, Mr. Shoulders worked as an Analyst for Legg Mason’s Aerospace, Defense & Government Services Investment Banking practice (later Stifel Nicolaus) in Baltimore, MD, where his experience included a variety of mergers, acquisitions, and public offerings. Mr. Shoulders graduated from William & Mary where he received a BBA in Finance with a concentration in Accounting. Mr. Shoulders is also qualified as a FINRA General Securities Representative (Series 7), Uniform Securities Agent (Series 63), and Investment Banking Representative (Series 79). Mr. Shoulders and his wife Elizabeth have three children.
Richard P. Stanley ’82
Bank of New York Mellon

Rick Stanley is an Executive Vice President Head of the U.S. Region of BNY Mellon's Corporate Trust Business and a member of BNY Mellon's Operating Committee. Mr. Stanley has over 30 years of experience in the financial services industry, beginning his career in the corporate lending program at Irving Trust Company. Mr. Stanley joined the Surface Transportation Division and was promoted to Vice President and Head of Marine Transport in 1986. Mr. Stanley was appointed Division President of Nassau/Queens in 1995. In 1997, Mr. Stanley was promoted to Senior Vice President, then as head of the Investor Relations Group for the Company in 1999. Three years later, Mr. Stanley was named head of the Global Product Management Division. He was promoted to Executive Vice President in 2004, and his responsibilities expanded the following year to include Global Accounting, Security Data Management, and Training. In 2007, Mr. Stanley was transferred to the Alternative Investment Services Division, heading the Product Management Group after the BNY Mellon merger. In 2010, he became Head of the Structured Finance Division in Corporate Trust before transferring to lead the newly created Global Middle Office Group to deliver the suite of Corporate Trust products worldwide. Mr. Stanley earned his BBA from William & Mary and his MBA from Columbia University's executive program.

Peter Voth ’15
Perella Weinberg Partners

Peter Voth is a second-year Analyst at Perella Weinberg Partners in New York. Mr. Voth works in the firm's Mergers & Acquisitions and Restructuring practices with a focus on the energy sector. Previously, Mr. Voth interned with PWP in the summer of 2014 and with BDO Capital Advisors in Boston in the summer of 2013. Mr. Voth graduated Summa Cum Laude from William & Mary in 2015 with a degree in Computer Science and a double major in Finance, and was a member of the Finance Academy.

Kwame Webb ’04
Morningstar

Kwame Webb, CFA, is an Equity Analyst for Morningstar, covering industrial distribution companies and heavy equipment manufacturers. Mr. Webb earned a MBA from the Wharton School of the University of Pennsylvania prior to joining Morningstar in 2013. During business school, Mr. Webb was a summer associate at Clearlake Capital Group, a private equity firm. From 2004 to 2011, Mr. Webb was a Vice President and Equity Analyst at T. Rowe Price, where he followed airlines, rental cars, trucking, and aerospace. Over his last five years at T. Rowe Price, Mr. Webb's "buy ratings" generated a cumulative 15% return, while his "sell ratings" generated a cumulative -16% return in a period where the S&P 500 declined 8% on a cumulative basis. Mr. Webb graduated Magna Cum Laude with a BBA from William & Mary and is a CFA. Outside of work, Mr. Webb is also involved with several mentoring, educational, and cultural organizations including Chicago Lights, the National Museum of African American History and Culture, Student Diplomacy Corps, and the Robert Toigo Foundation.
Gjergji Cici is the Thomas L. Owen Professor of Finance and Associate Professor at the Raymond A. Mason School of Business of the College of William and Mary. Professor Cici is also a Research Fellow at the Centre for Financial Research at the University of Cologne, Germany. Professor Cici received his Ph.D. in Finance from the University of Minnesota's Carlson School of Management. After receiving his doctorate, Professor Cici became Associate Director of Research for Wharton Research Data Services (WRDS) at the Wharton School of Business.


Vladimir Atanasov is an associate professor at the Mason School of Business, College of William & Mary. Professor Atanasov finished his Ph.D. in finance at the Pennsylvania State University in 2002. Professor Atanasov teaches the Financial Markets Career Acceleration Module and Portfolio Management in the full-time MBA program, Money and Debt Markets, Financial Management, and a "Distinguish" Advanced Portfolio Management class in the undergraduate program.

Professor Atanasov's research is primarily focused on corporate governance and specifically on the effect of controlling blockholders on firm value. He is also studying the effect of securities and corporate laws on the behavior of large investors and the relationship between certain legal statutes and capital market development. Other research projects that Professor Atanasov works on include the dilution of entrepreneurs in VC-backed firms and the effect of lawsuits on VC funding and deal flow. Professor Atanasov's research has been published in the Journal of Finance, Journal of Financial Economics, Journal of Financial and Quantitative Analysis, Journal of Banking and Finance, Journal of Corporation Law, and funded by several grants from the U.S. Department of State, the Kauffman Foundation, Australian Research Council, and the Melbourne Center for Financial Studies.
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