

11th Annual

**FROM DOG ST
TO WALL ST**

EVENT PROGRAM

&

PANELIST BIOGRAPHIES

October 5-6, 2017

Miller Hall

Thursday, October 5th

Keynote Address, Miller Hall, Brinkley Commons (2nd floor)

5:45 pm - 7:00 pm



Todd Boehly '96
Eldridge Industries

Todd Boehly is Chairman, Chief Executive Officer and controlling member of Eldridge Industries. Eldridge operates a portfolio of diversified businesses, with over 2500 employees, across several industries. Prior to founding Eldridge, Mr. Boehly was the President of Guggenheim Partners, where he launched their credit investing business and later assumed responsibilities for the asset management business. He received his BBA from the College of William & Mary and studied at the London School of Economics. In addition to being the Chairman and CEO of Eldridge, Mr. Boehly is a member of the Cain International Board and serves as a trustee or board member of several other organizations. He is a principal owner of the Los Angeles Dodgers, Dick Clark Productions, Billboard and The Hollywood Reporter, Media Rights Capital—the owner and producer of House of Cards—and A24—the owner and producer of Moonlight, winner of the Academy Award for “Best Picture” in 2016.

Friday, October 6, 2017

Opening Session, Brinkley Commons: Continental Breakfast provided
8:30 - 9:45 am - Investment Banking

Concurrent Sessions: see insert for room numbers

10:00 am - 11:00 am:

Session 1 - Career Success Early

Session 2 - Equity Analysis

Session 3 - Strategy Consulting

11:15 am - 12:15 pm:

Session 1 - Private Equity & Venture Capital

Session 2 - Private Banking

Session 3 - Corporate Finance

12:30 pm - 1:30 pm:

Session 1 - Commercial Banking

Session 2 - Risk Management

Session 3 - Asset Management

Panelist Biographies



Karim Ahamed is a Partner and Investment Advisor in the Chicago office of HPM Partners LLC. In addition to his client responsibilities, Mr. Ahamed sits on the Investment Committee, heads the firm's manager selection activities and authors the quarterly market outlook. Additionally, in his role as investment strategist, he works to identify key investment themes and trends, and to develop and implement the appropriate strategic and tactical positioning for client portfolios. Mr. Ahamed received his Bachelor of Arts degree from William & Mary and his Master of Management degree from the Kellogg School of Management at Northwestern University. He is a CFA charterholder. Mr. Ahamed is an active supporter of the college and currently serves on the Mason School of Business Foundation board.

Karim Ahamed '79
HPM Partners LLC



John Asbury joined Union in October 2016 as President and CEO. Mr. Asbury came to Union as part of a planned succession for the former CEO, who retired following 26 years in role. Mr. Asbury is a career banker with 30 years of experience in Commercial and Corporate banking. Most recently, he was President and CEO of privately-held First National Bank of Santa Fe, a multi-state bank with locations primarily in the Southwest I-25 corridor between Denver, CO and Albuquerque, NM. Prior to that, he was Senior Executive Vice President and Head of the Business Services Group at Regions Financial Corporation, one of the nation's largest full-service banks with \$126 billion in assets. Regions serves customers across the South, Midwest and Texas, and operates approximately 1,600 banking offices. At Regions, Mr. Asbury led all lines of business that serve the company's business and commercial banking customers. Prior to Regions, he spent 17 years at Bank of America, ultimately leaving as the Pacific Northwest Region Executive for Business Banking in Seattle, WA. Mr. Asbury has broad experience in commercial banking with prior positions responsible for multiple services and regions. After graduating from Virginia Tech, he began his banking career in the management training program at Wachovia Bank & Trust in Winston-Salem, NC. Mr. Asbury also holds an MBA from William & Mary and is a native of Virginia, born in Redford.

John Asbury MBA '98
Union Bank and Trust



Neal Batra is a Partner in the Life Sciences & Health Care Strategy practice. He joined the firm in 2003 and was named Partner in 2014. Mr. Batra's areas of focus are business model and operating model innovation and large enterprise transformation. He serves clients across the healthcare landscape - large pharma, biotechs, medtech, health insurers and healthcare retailers. Prior to Deloitte, Mr. Batra co-founded two digital businesses ("dot-com's") in the late 1990's. Prior to that, he worked as a rotating analyst at JPMorgan, joining straight out of William & Mary. Mr. Batra has an MBA from London Business School and lives in Manhattan, NY with his wife, Coye.

Neal Batra '97
Deloitte Consulting



Patrick Bisceglia is a Director in the Boston office of BDO Capital Advisors, a leading middle market investment bank and FINRA/SIPC member firm affiliated with BDO International, one of the largest accounting, tax, and corporate advisory networks in the world. Mr. Bisceglia advises middle market companies on buy- and sell-side M&A transactions, private equity recaps, capital raises, and strategic alternatives across a wide range of industries. Prior to joining BDO Capital in 2011, he worked in the Investment Banking Division of Mann, Armistead & Epperson, Ltd. and the U.S. Equity Division of T. Rowe Price Associates. Mr. Bisceglia graduated from William & Mary with a BBA in Finance and a minor in Economics.

Partick Bisceglia '09
BDO Capital Advisors



David Braun '87
Capstone Strategic

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.



Katherine Covino '12
Deloitte Risk & Financial Advisory

Katherine Covino, CPA, is a Manager in the Financial Risk, Transactions, and Restructuring group at Deloitte Risk & Financial Advisory. Ms. Covino is based in Washington, DC and spends most of her time working with pension plans and retirement funding issues for commercial entities and public sector pensions. She currently works with a regulatory government agency to mitigate risk to pension plan participants. She also leads a team that performs compliance reviews of multi-employer pension plans. Ms. Covino has served clients across the federal government and in the financial services industry. Before joining her current group at Deloitte, she spent time in the firm's Forensic practice, serving on forensic accounting and anti-money laundering engagements. Prior to joining Deloitte, Ms. Covino earned her BBA from William & Mary in 2012 with an Accounting major, Finance concentration, and History minor.



Andrey Dean MBA '17
Ernst & Young

Andrey Dean is a seasoned information technology and cyber security practitioner. He is currently employed by Ernst & Young and is a member of the Program Risk and IT transformation practice. Mr. Dean is experienced in advising Fortune 500 executives on their complex program initiatives and large capital projects. He has over ten years of experience in implementing Department of Defense and commercial IT programs globally. He has also served in the Biometric and Smart Card industry, Government Intelligence Agencies, and British Ministry of Defense. Before joining Ernst & Young, he served his country as a United States Marine and has completed multiple deployments to Afghanistan and Iraq. Mr. Dean is a recent graduate of the William & Mary Executive MBA program, where he served as the class leader. He received a BS in computer science from Christopher Newport University. He currently serves on the Christopher Newport Peninsula Alumni Chapter board of directors. Mr. Dean also serves as a member of the Greenwood Christian Academy School Board. His goal is to start his own Cyber Security company.



Harold Eylward '98
J.P. Morgan

Harold Eylward is a Managing Director and the Investment Practice Leader for the East Region of the Private Bank at J.P. Morgan. In this role, Mr. Eylward leads a U.S.-based team of over 200 Investment Specialists along the East Coast who work with clients on both a discretionary and self-directed basis. His team is responsible for advising ultra high net worth individuals, families, foundations, senior executives, and owners of privately held companies. He works closely with J.P. Morgan's Strategy and Solutions teams to bring the firm's best thinking around portfolio management across asset classes to our Investment Specialists and our clients. Mr. Eylward is also a member of the Global Investments Leadership Team and the Private Bank US Operating Committee. Mr. Eylward joined J.P. Morgan in 1998 after graduating from William & Mary with a degree in Business Administration. He remains actively involved with his alma mater and is captain of the school's recruiting team at J.P. Morgan.



Will Glass '07
Perella Weinberg
Partners

Will Glass has over a decade of corporate finance experience across industries and products including M&A, private capital, public capital, restructuring, hostile defense and strategic advisory. Though he currently focuses on medical devices and healthcare IT, he 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 \$15M to >\$50B. Prior to joining Perella Weinberg Partners, Mr. Glass worked on a variety of mergers and acquisitions transactions in AIG's Financial Service Division and Bear Stearns' TMT group. He also worked for the U.S. Congress Joint Economic Committee in a research capacity. Mr. Glass received a BA in Finance and International Relations, summa cum laude, from the College of William & Mary, where he was a James Monroe Scholar and an Accenture Scholar. He also attended the London School of Economics.



Jack Goldstein '14
Jefferies LLC

Jack Goldstein is an Associate with the Aerospace & Defense Investment Banking team at Jefferies LLC, a global investment bank and wholly-owned subsidiary of Leucadia National Corporation (NYSE: LUK), a diversified holding company. At Jefferies, Mr. Goldstein advises his clients in the A&D sector on various transactions including mergers, acquisitions, divestitures, debt and equity capital raises. Mr. Goldstein graduated from William & Mary in 2014 with a BBA in Finance and double minor in Accounting and Economics.



Bill Grant
New York Venture
Bank

Bill Grant is currently an organizer and proposed director of the proposed New York Venture Bank in NYC. He is also an advisory board director for Martello Investments in Norfolk, VA. Mr. Grant was an organizer and founding director of Square 1 Bank and Square 1 Financial in NC and was part of a new ownership team that rescued FSG Bank and First Security Group, Inc. in TN. He is retired from the US Treasury, with 30 years in bank regulation, human resources and public affairs. Mr. Grant is an Executive Partner with the Mason School of Business at W&M. He is past Chairman of the Business Advisory Council at East Carolina University, where he obtained his undergraduate degree in Business Administration. Mr. Grant has a graduate certificate in banking from LSU and a graduate certificate in public policy from the Federal Executive Institute. He is a certified executive coach.



Rick Hartmann III '08
Gen Re

Rick Hartmann joined Gen Re in 2008 as a Global Property Facultative underwriter in the Philadelphia branch. In 2015 Mr. Hartmann was promoted to Treaty Account Executive in Gen Re's Stamford office. He is responsible for developing cost effective and efficient reinsurance programs for mutual insurance companies. He leads several multi-line and umbrella client and prospect teams. Mr. Hartmann is a frequent speaker on reinsurance topics and has delivered 'State of the Industry' and 'Emerging Issues' presentations to clients and industry trade groups. He is a member of the Property Business Development team and has authored blogs and publications on property insurance exposures. Mr. Hartmann received a BA from William & Mary and is a member of the Officers' Council for the Boehly Center at the Mason School of Business. He holds an Associate in Reinsurance designation and has completed CPCU 500, 520, 540, and 551.



Sean Haywood '11
EY Financial
Services Advisory

Sean Haywood is a Manager with EY's Wealth & Asset Management consulting practice. Mr. Haywood leads projects that digitize and improve the user experience for both clients and financial advisors. He has been with EY for 6 years, working on Performance Improvement engagements across the US for large financial services firms. Mr. Haywood graduated from William & Mary in 2011 with a BBA in Finance and concentration in Accounting.



Brian Hiestand
College of William & Mary Foundation

Brian Hiestand joined the College of William & Mary Foundation in 2005 to serve as its first Chief Investment Officer overseeing all of the investment management functions for the endowment including asset allocation and manager selection and review. Prior to joining William and Mary, Mr. Hiestand was a Principal and Portfolio Manager at Harris Investment Management in Chicago and served as the first Director of Alternative Investments for the Indiana University Foundation in Bloomington, Indiana, where he launched their Alternative Investment Program for allocations to hedge funds, venture capital, private equity, and timberland. Among his accolades, Mr. Hiestand received the Institutional Investor Small Endowment of the Year Award in 2011. Mr. Hiestand received his BS and MBA from Bowling Green State University.



Aaron Hurwitz '08
CCMP Capital

Aaron Hurwitz is a Senior Associate in the New York office of CCMP Capital, a private equity firm focused on industrials, consumer / retail, and healthcare. Prior to joining CCMP in 2015, Mr. Hurwitz was an Associate at Veritas Capital, a private equity firm focused on defense and government services. Prior to that, he was an Analyst in the Industrials Group at Deutsche Bank, spending time across a range of sectors including building products and aerospace. Mr. Hurwitz holds a BBA from William & Mary and an MBA from The Wharton School of the University of Pennsylvania.



Klaudia Kasztelaniec '09
McKinsey & Company

Klaudia Kasztelaniec is an Engagement Manager at McKinsey & Company. In her role, she advises large private companies across range of industries on sales & marketing related topics. Ms. Kasztelaniec earned her BA degree from William & Mary and an MBA from Stanford Graduate School of Business. She was a member of the varsity tennis team at William & Mary.



Eric Kauders, Jr. '91
U.S. 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 broad team of professionals to deliver fiduciary advice and services and wealth structuring guidance 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, where he was responsible for providing fiduciary and risk management legal guidance to Bank of America's Private Bank across the Mid-Atlantic and Northeast regions of the franchise. In December 2005, he became a Trust Team Leader for the Virginia Market, and was promoted to Market Trust Executive for Virginia in 2008. He has held his current position since 2009. Before joining the company, Mr. Kauders was an attorney with McGuireWoods, a law firm with offices worldwide, where his practice focused on representing banks and trust companies, as well as various closely-held business entities facing commercial disputes. Mr. Kauders graduated with High Honors from William & Mary, where he majored in both Public Policy and Government. After graduating, he served as a Governor's Fellow in the Cabinet of Virginia Governor L. Douglas Wilder. He then earned a law degree from the University of Virginia School of Law, where he was a member of the Virginia Law Review. Mr. Kauders is member of the board of directors of the Virginia Council on Economic Education, and serves on the boards of a number of charitable foundations, including The Windsor Foundation, The Jeffress Memorial Foundation, The Gwathmey Memorial Trust, and The Loughran Foundation.



Alex Kocher '12
Global Endowment
Management

Alex Kocher is an Associate Director on the Investor Services Team at Global Endowment Management (GEM), an outsourced CIO that manages ~\$8.5 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 client communication, marketing and business development. He was a Senior Analyst on the Public Investments team at GEM until July 2017, having responsibility 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 GEM in July 2014, he was an Investment Banking Analyst in Jefferies' Consumer and Retail group. Mr. Kocher graduated from William & Mary in 2012 with a BBA in Finance and a double major in International Relations. He is a CFA charterholder.



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. He 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 charterholder, member of the Girard College Foundation Board, and recipient of the Howard J. Busbee Finance Academy Alumni Award.



Debbie Linkenauger '79
BB&T

Debbie Linkenauger is a Senior Commercial Banker in the James River Region of BB&T. Ms. Linkenauger has over 30 years of banking experience and has been with BB&T since 2006. At BB&T, Ms. Linkenauger is responsible for developing, managing, and growing a portfolio of Middle Market clients by providing solutions ranging from loans and deposits to treasury management and capital markets. Prior to joining BB&T, Ms. Linkenauger was a Commercial Banker at Wachovia and C&F Bank, and was the Manager of Commercial Profitability, Automation, and Training in Commercial Administration at Central Fidelity, and was also the Domestic Funding and Hedging Manager on their Funds Management Desk. She has also been a residential general contractor. Ms. Linkenauger graduated from William & Mary in 1979 with a BA in Economics.



Chris Maher '79
Ernst & Young

Chris Maher is a principal in EY's Financial Services Office (FSO) He concentrates on risk management and advisory services covering activities conducted by US domestic banks, bank holding companies, and international banking organizations supervised by the Federal Reserve. He also focuses on risk management and control advisory services to nonbank financial services. 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, he led a team that was involved in assisting a global financial services client in benchmarking a broad range of enterprise risk management practices including market, credit, liquidity and operational risks, capital management, compliance activities, bank regulatory reporting, operations and technology functions, as well as group internal audit. The organization was preparing for an examination by the Federal Reserve and interested in understanding current practices against supervisory standards. Projects for this client have involved travel to Amsterdam, Hong Kong, London, Melbourne, Paris, Sydney and Tokyo. 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. He 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. He 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 Management from William & Mary.



Laura Markley '07, MAcc '08
NRV VC

Laura Markley has experience in a broad range of Financial Services, including front-office Investment Banking at Deutsche Bank, financial valuation and audit at PricewaterhouseCoopers (including consulting for Barclays' takeover of Lehman Brothers), and private wealth management at Ziff Brothers Investments. Ms. Markley currently serves as the Director of Investments with NRV, a Richmond-based Venture Capital firm focused on early-stage growth companies. Ms. Markley earned a BBA with majors in English and Accounting, as well a Master of Accounting degree, from William & Mary. She also holds an MBA from Columbia University.



Mark McFadden '99
CCMP Capital Advisors

Mark McFadden is a Managing Director in the New York office of CCMP Capital Advisors, LP (“CCMP”). CCMP specializes in middle market buyouts and growth equity investments of \$100 million to \$500 million in Industrial, Consumer, and Healthcare businesses in North America and Europe. CCMP focuses on generating alpha through the operational transformation and growth of its portfolio companies. Mr. McFadden worked in CCMP’s New York office from 2002 to 2004 and then spent two years in CCMP’s London office, returning to the New York office in 2006. Prior to joining CCMP in 2002, Mr. McFadden was an investment banking Analyst at Credit Suisse and Bowles Hollowell Conner. Mr. McFadden focuses on making investments in the industrial sector and currently serves on the board of directors of Hayward, PQ Corporation and Milacron. Mr. McFadden has also been involved in the firm’s prior investments in Generac and Eco Services. Mr. McFadden holds a BBA in Finance and a BA in History from William & Mary.



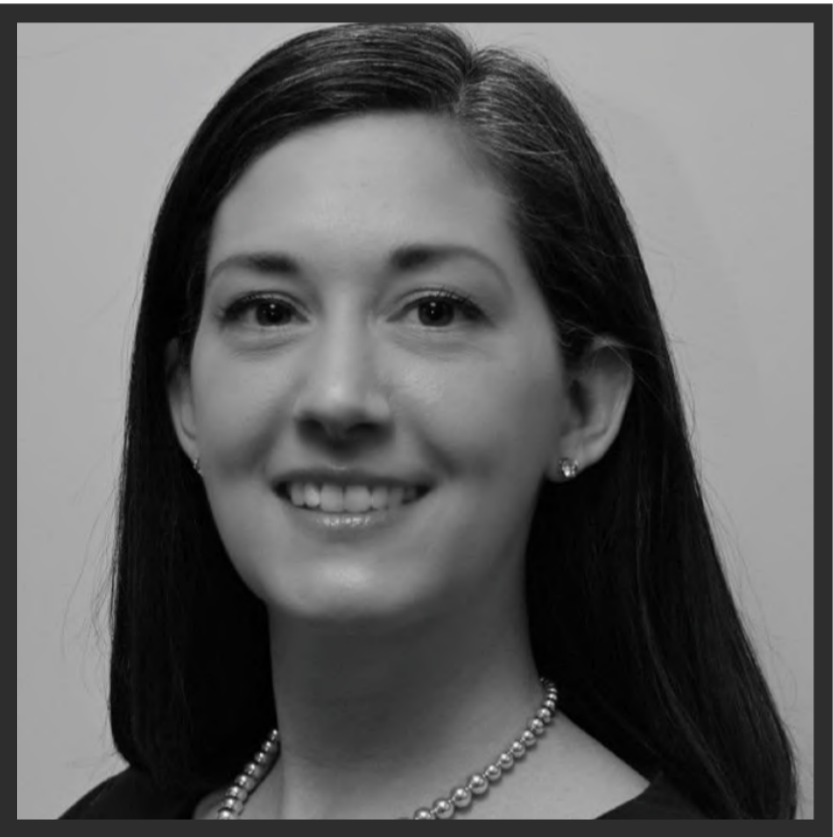
Ed McGann '82
Bank of New York
Mellon

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, he 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. He 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.



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 Broadlines & Hardlines. Mr. Melich has been ranked #1 in Institutional Investor for Retail Broadlines & Hardlines for the past five years. 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 7 years, he built Morgan Stanley's European auto research effort, and was ranked Institutional Investor #1 auto analyst for three consecutive years. He returned to the US in 2003 to head Morgan Stanley's Global Retail Research Team. Mr. Melich graduated from William & Mary in 1992 and is a CFA charterholder.



Catherine Mountjoy
William & Mary
Investment Trust

Catherine Mountjoy is the Director of Investments for the William and Mary Investment Trust (WAMIT) investment team, which she joined in 2016. Ms. Mountjoy is a generalist on the team working on all asset classes across the portfolio. Before joining WAMIT, she was a Partner with Altius Associates (now part of Pavilion Financial Corporation), a private markets investment consulting firm. At Altius, she focused primarily on North American private equity investing, with an emphasis on the buyout sector. Ms. Mountjoy has additional experience with other private equity sectors and geographies, including co-investments, credit, secondaries, energy, timber, infrastructure, emerging managers, and emerging markets. Prior to Altius, Ms. Mountjoy was an Investment Banking Analyst at Raymond James & Associates. She began her career at First Union Capital Market (now part of Wells Fargo) in the asset securitization group. Ms. Mountjoy has a BA (Magna Cum Laude) in Economics from Emory University and an MBA from the Darden School of Business at the University of Virginia.



Keith Percic
Riverside Health
System

Keith Percic is the Vice President-Finance for Riverside Health System. He is responsible for the management of the general ledger, accounts payable, reimbursement, tax, budget, payroll, and treasury management functions of the Riverside Health System. Prior to directing the operations of Riverside Health System's corporate accounting department, Mr. Percic served in other various capacities for Riverside including Director of General Accounting, Reimbursement Manager, Budget Manager and Staff Accountant. Prior to joining Riverside in 1978, he worked as a manager at Busch Gardens, Williamsburg, a buyer at Newport News Shipbuilding, and an Accountant with C. W. Wolfe & Co., CPA's (New Castle, PA). Mr. Percic holds a Bachelor of Science degree in Business Administration, with concentrations in Accounting and Finance, from Clarion State College, and a Masters in Business Administration, with a concentration in Accounting, from Old Dominion University. Mr. Percic is licensed as a certified public accountant in Virginia.



Thomas Lee Rice '15
Harris Williams & Co

Thomas Lee Rice is a 3rd Year Analyst on the Energy, Power & Infrastructure team at Harris Williams & Co. (HW&Co.), a preeminent middle market investment bank focused almost exclusively on sell side mergers and acquisitions. At HW&Co. Mr. Rice is responsible for various valuation analyses as well as presentation materials and coverage of the broader energy and infrastructure space. Following his completion of his third year at HW&Co., he will be joining Monomoy Capital Partners in New York City as an Associate. Mr. Rice graduated Magna Cum Laude from William & Mary in 2015 with a BBA in Finance and a concentration in Entrepreneurship.



Thomas Rideout,
HON '15
Invictus Group

Tom Rideout is a Director of the Bank CEO Advisory Board for Invictus Group, a consultancy that provides forward looking data analytics services and consulting to smaller Dodd-Frank, regional and community banks. Mr. Rideout spent 17 years in senior capital markets and funds management roles with Wachovia Bank & Trust Co. of Winston-Salem, NC. He also served as President and CEO of Savannah (GA) Bank & Trust Co. prior to its sale to First Union Corporation, where he was Vice Chairman and a Management committee member of its North Carolina subsidiary. During his banking career, he held volunteer roles as Treasurer and President of the American Bankers Association. Mr. Rideout closed out his full-time working career as Director of Corporate and Alumni Relations at the Raymond A. Mason School of Business and is beginning his 12th year as an Executive Partner there. He was made an Honorary Alumnus of William & Mary by the College's Alumni Association Board in May 2015.



Cabell Rosanelli '09
Cerberus Capital
Management

Cabell T. Rosanelli is a Senior Associate at Cerberus Capital Management, a private investment firm that manages \$30 billion across four principal strategies - Private Equity, Distressed Securities and Assets, Middle Market Lending, and Real Estate. Mr. Rosanelli works within Cerberus Operations and Advisory Company (COAC), Cerberus' proprietary operations affiliate. In this capacity, he has worked with several Cerberus portfolio companies to provide strategic guidance across a range of functional areas; he has also participated alongside investment professionals in the due diligence process. Most recently, he helped to launch a new business unit at New Avon, a leader in the direct sales industry. Mr. Rosanelli began his career at Deloitte Consulting and subsequently spent two years at CrossCountry Consulting, a boutique consulting firm in McLean, Virginia. He holds a BA in Economics / Government from William & Mary, MA in Political Science from Georgetown University, and MBA from the Darden School of Business. Mr. Rosanelli was a student-athlete at both William & Mary and Georgetown; he is a board member of the Tribe Club, a non-profit organization focused on enabling William & Mary student-athletes to achieve success on and off the field.



Greg Shenkman '03
Shenkman Capital

Greg Shenkman is a leveraged loan trader for Shenkman Capital in New York City. Founded over 32 years ago, Shenkman Capital Management is a leading institutional money manager specializing in leveraged companies. Shenkman Capital has offices in New York, NY; Stamford, CT; and London, England. Mr. Shenkman has worked there since graduating from The College of William & Mary in 2003 with a BBA in finance. His first two years were in the Research Department as a junior credit analyst before becoming a high yield bond trader. Since 2012, he has been the firm's dedicated leverage loan trader. Mr. Shenkman served on the Business Partners Board for the Undergraduate Business Program of The Mason School of Business at The College of William & Mary from 2007 until 2012.



Corey Shull '06
T. Rowe Price

Corey Shull is a vice president of T. Rowe Price Group, Inc., and T. Rowe Price Associates, Inc. He is a research analyst in the Equity Division of T. Rowe Price, covering media and telecommunications companies. Mr. Shull is a vice president and a member of the Investment Advisory Committee of the Media & Telecommunications and New Horizons Funds. Prior to joining the firm in 2006, he was employed as a student assistant by The College of William and Mary in the Department of Government. He also interned at the U.S. Department of State, Office of United Nations Political Affairs, and Bureau of International Organization Affairs. Mr. Shull has worked internationally as a research assistant for several projects, including Green Aid - Project Level Aid and Monroe Scholars Field Research Projects. He earned a BA, summa cum laude, in economics and government from The College of William and Mary, where he was a Monroe Scholar. Mr. Shull has earned the Chartered Financial Analyst designation.



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' experience in the financial services industry, beginning his career as a management trainee in the corporate lending program at Irving Trust Company. He joined the Surface Transportation Division and was eventually promoted to Vice President and Head of Marine Transport, a specialized project lending activity in 1986. In 1991, Mr. Stanley was appointed District Manager of Western Nassau and Queens in the Retail Sector and was involved in the Barclays Bank acquisition in 1992. He was promoted to Division President of Nassau/Queens in 1995. The following year, he was named to head the reorganized Small Business Lending Division, which then combined to include the middle-market lending activity for Nassau/Suffolk/Queens and Brooklyn. In 1997, Mr. Stanley was promoted to Senior Vice President and was transferred to New York City as Assistant to the Chairman and Chief Executive Officer. He was assigned to special projects for the Chairman, including workout, specialized lending and select M&A activities. In 1999, he was appointed to head the Investor Relations Group for the Company. Three years later, he was named head of the Global Product Management Division and oversaw the strategic product development for the Investor Services Sector, one of The Bank of New York's core Businesses. Mr. Stanley 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 Bank of New York Mellon merger. In 2010, he was appointed Head of the Structured Finance Division in Corporate Trust. The following year, he was transferred to lead the newly created Global Middle Office Group delivering the suite of Corporate Trust products worldwide. Mr. Stanley earned his BBA from William & Mary and his MBA from Columbia University's executive program.



Kwame Webb '04
Brown Capital
Management

Kwame C. Webb joined Brown Capital Management in 2017. Previously, Mr. Webb was a senior equity analyst at Morningstar, Inc. and an investment analyst and Vice President at T. Rowe Price Group, Inc. He earned an MBA in finance from the Wharton School of the University of Pennsylvania as a Robert Toigo Fellow. He earned a BBA in finance from William & Mary, where he was a William & Mary scholar and graduated magna cum laude. Mr. Webb is a CFA charterholder and a member of the Baltimore CFA society, and he was also honored with the Toigo Foundation's "40 Under 40" designation in 2015.



Steve Williams '99
Delta Air Lines

Steven Williams currently serves as Managing Director – Strategic Corporate Development at Delta Air Lines' World Headquarters in Atlanta, GA, where he leads a team focused on strategic M&A, tactical growth initiatives, joint ventures and portfolio optimization. Mr. Williams has responsibility for Delta's global portfolio of direct equity investments in partner carriers, including Air France- KLM, Aeromexico, China Eastern, Gol, and Virgin Atlantic. In addition, he leads a team focused on Delta's partnership initiatives, including joint venture, code share and interline agreements with Aerolineas Argentina, Air Europa, Alitalia, China Southern, China Air, Hawaiian, Jet Airways, Korean Air, Transavia, Virgin Australia and WestJet. Delta is among the world's largest global airlines, with market capitalization of \$40Bn, a fleet of more than 1,200 aircraft and service to 315 destinations in 54 countries across six continents. Delta offers more than 15,000 daily flights, and employs more than 80,000 employees worldwide. Prior to Delta, Mr. Williams spent more than a decade at Morgan Stanley in the Investment Banking Division in New York, where he worked in both the Mergers and Acquisitions Group, as well as the Global Industrials and Transportation Group. In his time at Morgan Stanley, he worked on more than \$300Bn of announced M&A and capital markets activity across a wide range of clients. Mr. Williams received his MBA degree from the Darden Graduate School of Business at the University of Virginia and received his BBA in Finance from William & Mary.



Johnny Mac Yates '16
Dominion Energy

Johnny Mac Yates graduated from William & Mary in 2016 after majoring in Finance and Government. He joined Dominion Energy (DE) where he worked on the financial analysis team assessing organic growth opportunities and asset level acquisitions, including \$500M of utility-scale solar projects. In 2017, he joined the corporate M&A team and has been involved in a range of prospective and live deals as well as strategic financial analysis relating to Dominion Energy Midstream (DM), DE's publicly traded master limited partnership. Mr. Yates also has a passion for outdoor activities, particularly cycling, surfing, and skiing. He instructs at Wintergreen Resort when free time permits.

Faculty Moderators



Brent Allred, PhD
Mason School of
Business

Brent B. Allred is Professor of Strategic Management and International Business in The College of William & Mary's Raymond A. Mason School of Business, which he joined in 1999. He earned his PhD from The Pennsylvania State University and an MBA and BS in Accounting from Brigham Young University. Prior to returning to academics, he spent several years in the tech industry with Intel, Symantec, Central Point Software, and Novell. Dr. Allred has traveled the world extensively, having lived in Belgium, The Netherlands, Hong Kong, Bulgaria, New Zealand, and Scotland. He also had extended stays in several countries, including India, Uganda, Estonia, Hungary, and Australia. He has taught business courses throughout the world, including on Semester at Sea in 2013. He has won several student selected teaching awards at The College of William & Mary, including in the Undergraduate Business Program (2008, 2002), Full-Time MBA Program (2010), Executive MBA Program (2012), and FLEX MBA (Evening) Program (2017, 2014, 2004). Dr. Allred's current research interests are in global corruption, technology sourcing, and patent rights. He has published in various journals, including the Journal of International Business Studies, Management International Review, the Journal of International Management, Academy of Management Executive, and the Journal of Product Innovation Management.



Carl Tack '78
Mason School of
Business

Carl Tack is a Clinical Professor of Finance and Co-Director of the Boehly Center. He currently teaches an undergraduate course in financial institutions and a graduate course in applied corporate finance. He began his professional career as a corporate lawyer with Kirkland & Ellis in Chicago, representing private equity and venture capital firms. After several years of legal practice, Mr. Tack joined Salomon Brothers as an investment banker in Chicago. He then worked for Merrill Lynch in Chicago and London and for Deutsche Bank in London, where he was co-head of the global telecommunications investment banking practice and vice-chairman of the global TMT group. Mr. Tack retired from investment banking in 2009 and has since served as a managing partner of a Dubai-based telecoms consulting business, director of a US based public manufacturing company, and lecturer in Finance. Prior to teaching at the College of William & Mary, he lectured at the London Business School in London and Dubai. Mr. Tack received his BA in Economics from The College of William & Mary and his J.D. from the University of Chicago Law School.

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