

M I L L E R H A L L

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TO  
WALL ST.

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P A N E L I S T B I O G R A P H I E S

# 12<sup>TH</sup> ANNUAL FROM DoG ST. TO WALL ST.

**Thursday, September 27, 2018**

*Keynote Address, Miller Hall, Brinkley Commons (2<sup>nd</sup> Floor)*

5:45-7:00pm



## **Kimberly Alexy, MBA '93**

Kimberly Alexy, CFA, is a seasoned finance professional and corporate Board member. She has over 20 years of experience in capital markets, IPOs, corporate finance and investments, with expertise in exploring shareholder value creation strategies, executing mergers and acquisitions and various equity and debt financings. Ms. Alexy was a sell-side equity research analyst on Wall Street for nearly a decade specializing in technology stocks and was acknowledged by leading financial publications such as the Wall Street Journal for her stock picking expertise. Over the past 13 years, she has been an active Board member at multiple publicly-traded and pre-IPO companies and has Chaired Audit, Compensation, Nominating and Governance Committees as well as a series of Special Committees. Ms. Alexy has also taught Finance in the Graduate School of Business at San Diego State University. Ms. Alexy has served on the Board of Directors of multiple publicly-traded companies and qualifies as a financial expert. At present, she serves on the Boards of Alteryx, FireEye, Five9, and CalAmp. She resides in San Diego with her husband and two sons.

**Friday, September 28, 2018**

*Opening Session, Brinkley Commons: Continental Breakfast provided*

8:30 - 9:45 am - Investment Banking

*Concurrent Sessions: see insert for room numbers*

10:00am-11:00am	Session 1 – Career Success Early Session 2 – Equity Analysis Session 3 – Strategy Consulting
11:15am-12:15am	Session 1 – Private Equity Session 2 – Wealth Management Session 3 – Corporate Finance
12:30pm-1:30pm	Session 1 – Sales and Trading Session 2 – Risk Management Session 3 – Asset Management

*Closing Session: Brinkley Commons*

1:30pm – 2:30pm Lunch and Networking with Panelists

# PANELIST BIOGRAPHIES



**Karim Ahamed '79**  
**HPM Partners**

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.

**Kevin Andrews '17**  
**Morgan Stanley**



Kevin Andrews is an investment banking analyst in the Global Services Group at Morgan Stanley. At Morgan Stanley, Mr. Andrews helps advise on a variety of M&A, leveraged buyout, and capital markets transactions, as well as activism defense situations, primarily focusing on technology-enabled services companies. Mr. Andrews graduated summa cum laude from William & Mary with a BBA in Finance, Accounting Concentration, and Computer Science Minor.



**Will Bruschi '17**  
**Harris Williams**

Will Bruschi is an investment banking analyst in the Business Services Group at Harris Williams, where he helps advise on sell-side transactions across a variety of industries. Mr. Bruschi graduated from William & Mary with a BBA in Finance and Accounting Concentration. He was a Senior Analyst with the Mason Investment Club, and a Vice President of the Finance Academy.



**Giorgio Caterini '17**  
**Ernst & Young**

Giorgio Caterini is an Analyst in the Structured Finance Advisory Services (SFAS) Commercial Mortgage Backed Securities (CMBS) Collateral group within the FSO Advisory practice of Ernst & Young LLP. Mr. Caterini began his career with EY as a member of the Business Advisor Program (BAP) spending the majority of his time with the Capital Management and Credit Risk practice before aligning to the SFAS CMBS group. Mr. Caterini graduated Cum Laude from William &

Mary with a BBA in Finance, a minor in Hispanic Studies, and a concentration in Accounting.



**Matt Cho '17**  
**Goldman Sachs**

Matt Cho is an Analyst in the New York office of Goldman Sachs' Risk Division covering their Investment Banking and Consumer & Commercial Banking Divisions. In his role, he works with the divisions to project capital, perform due diligence on new activities/business opportunities, and set and maintain risk thresholds. He graduated from William & Mary with a BBA in Finance and minor in Mathematics. Outside of work, Mr. Cho volunteers for different Asian-American non-profit organizations in the DC and NYC area.



**Niles Chura '91**  
**Kennedy Lewis Investment Management**

Niles Chura is a Partner at Kennedy Lewis Investment Management, a New York based institutional manager focused on opportunistic credit strategies. He was formerly a Managing Director and Co-Head of the Credit Markets Platform at CRG LP. Before joining CRG, Mr. Chura founded and led Ouray Capital, a boutique advisory business. Previously, Mr. Chura was a Portfolio Manager at Highland Capital Management, LP, one of the largest alternative investment managers in the United States, where he provided research coverage for a \$1.5+ billion portfolio of leveraged loans, high yield bonds, and equities in the telecom, media, and technology sectors. He was responsible for recommending trades and managing existing holdings, which included par, stressed and distressed securities, as well as originating private mid-market transactions and leading activist campaigns. Prior to Highland Capital, Mr. Chura was a member of the Media and Telecom team at Bank of America. Prior to that, Mr. Chura worked in the Finance & Planning group at a large U.S. corporation. Before starting a career in finance, Mr. Chura was as a Field Artillery Officer in the U.S. Army and served overseas from 1991 to 1995. Mr. Chura received a BA in Economics and Government from William & Mary in 1991, and an MBA with a Finance concentration from Yale University in 1998. In 2017, the Pacific Research Institute published "Beyond the New Normal", a 4-part economic research study he co-authored that described how an improved policy mix could lead to the return of strong economic growth.



**Katherine Covino '12**  
**Deloitte Risk & Financial Advisory**

Katherine Covino, CPA, is a Manager at Deloitte Risk & Financial Advisory, specifically working with the firm's Financial Risk, Transactions, & Restructuring group. Ms. Covino is based in Washington, DC and focuses on mitigating the financial risks that federal, state, and local governments face in their relationships with third parties. She also works with pension plan and retirement funding issues and challenges, pension plan compliance issues, mortgage-backed securities (MBS) issuer compliance, and complex asset valuations. Ms. Covino has served clients across government and in the financial services industry during her 6+ year tenure at Deloitte. Before joining her current group at Deloitte, Ms. Covino 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.



**Matt Darling '16**  
**Freeman & Co.**

Matt Darling is a Senior Analyst at Freeman & Co. Mr. Darling joined the firm in 2016 as a member of the M&A and Advisory Services practice. He has focused his efforts on the firm's broker-dealer and financial technology practices and assisted on transactions across buy and sell-side M&A, private placements and board advisory assignments. Prior to joining Freeman & Co. full-time, Mr. Darling was a Summer Analyst at the firm in 2015. He received his BBA in Finance with a

concentration in Entrepreneurship and a minor in Mathematics from William & Mary.



**Andrey Dean MBA '17**  
**Ernst & Young**

Andrey Dean is a seasoned information technology and cybersecurity 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 IT programs globally. Mr. Dean has also served in the Information Security, 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 William & Mary's 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 and has plans to start his own Cyber Security company.



**Abbey Doski '16**  
**Bain & Company**

Abbey Doski is a Senior Associate Consultant with Bain & Company, a global consulting firm and one of the "big three" management consultancies, in the Atlanta, Georgia office. In her two years at Bain, Ms. Doski has worked on projects in Industrial Goods & Services, Financial Services, Insurance and Private Equity, helping clients with challenges including future strategy, merger integration, program management, and commercial excellence. Prior to

joining Bain in July of 2016, Ms. Doski was a post-baccalaureate fellow in the Boehly Center where she helped launch the inaugural W&M Women's Stock Pitch and Leadership Summit. Ms. Doski graduated from William & Mary in 2016 with a BBA in Finance and a minor in Psychology, and was heavily involved with undergraduate admissions, club volleyball, and various Boehly Center clubs as an undergraduate student.



**Harold Eylward '98**  
**JP Morgan**

Harold Eylward is a Managing Director and the Investment Practice Leader for the East Region of the Private Bank at JP Morgan. In this role, Mr. Eylward leads a US-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 JP

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 JP 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 JP Morgan.



**Jack Goldstein '14**  
**Jefferies LLC**

Jack Goldstein is an associate with the Aerospace & Defense Investment Banking team at Jefferies LLC, a full service investment bank that is part of the publicly traded Jefferies Financial Group Inc. (NYSE: JEF), a member of the S&P 500 with a market capitalization of approximately \$10 billion. While at Jefferies, Mr. Goldstein has executed more than 25 M&A, debt, and equity transactions totaling more than \$16.5 billion. Mr. Goldstein graduated cum laude from William &

Mary in 2014 with a BBA in Finance, a concentration in Accounting, and a minor in Economics.



**Brian Hiestand**  
**College of William & Mary Foundation**

Mr. 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 & 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 B.S. and M.B.A. from Bowling Green State University.



**John Hyman, MBA '85**  
**Algonquin Advisors LLC**

John Hyman has over 30 years of experience in developing and leading sophisticated high net worth investment advisory businesses. Mr. Hyman is responsible for managing the company's day-to-day operations. Mr. Hyman is a member of the firm's Investment Committee and he chairs the firm's Compliance Committee. Prior to joining Algonquin in 2010, Mr. Hyman was a Senior Managing Director for JP Morgan Securities and its predecessor firm Bear Stearns & Co., Inc. He served on JP Morgan's Global Wealth Management's Investment Leadership Team, Investment Review and New Products Committees. Prior to the merger of Bear Stearns and JP Morgan he had overall responsibility for the firm's investment advisory business, where he managed the group's product, due diligence and operations teams and chairing the Due Diligence, Research, Performance Measurement and Portfolio Manager Review Committees. Prior to joining Bear Stearns in 2003, he was a Managing Director at Oppenheimer & Co., Inc. where he led the firm's Asset Management Group. Previously he worked in the investment management consulting groups at Smith Barney, Harris Upham & Co. and Drexel Burnham Lambert. Mr. Hyman formerly co-chaired the Investment Committee for the Foundation for Jewish Culture and was a member of the organization's Board of Directors and Executive Committee. He is a past Harris Center Fellow at Franklin & Marshall College. Mr. Hyman, a graduate of Franklin & Marshall College, received his MBA from William & Mary. He is a Certified Investment Management Analyst and a member of the Investments & Wealth Institute.



**Klaudia Kasztelaniec '09**  
**McKinsey & Company**

Klaudia Kasztelaniec is an Engagement Manager at McKinsey & Company. In her role, she advises large private companies across a range of industries on sales and marketing related topics. Ms. Kasztelaniec earned her BA from William & Mary with majors in Economics and Finance, and her MBA from Stanford University's Graduate School of Business. She was a member of the varsity tennis team while at William & 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 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. He is also a member of St. James's Episcopal Church.



**Conor Keevey '17**  
**JP Morgan**

Conor Keevey graduated from William & Mary in 2017 with a BBA in Finance, a concentration in Accounting, and a minor in Mathematics. Since graduation, he has worked as an investment banking analyst at JP Morgan in the Leveraged Finance group, focusing on transactions in the energy industry.



**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 ~\$9 billion for an institutional client base and was founded by a team from the Duke University and Duke Endowments. Previously, Mr. Kocher was a Senior Analyst on the Public Investments team at GEM until July 2017. 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 with a BBA in Finance and a double major in International Relations. He is a CFA Charterholder.



**Daniel Kuzjak '17, MSBA '18**  
**Clearsight Advisors**

Daniel Kuzjak is a two-time graduate from William & Mary, first with a BBA in 2017 followed by an MSBA in 2018. He majored in Finance during his undergrad career before pursuing a Master of Science in Business Analytics. During Mr. Kuzjak's time at the College he was a member of a number of extracurricular organizations, serving as a wide receiver on the football program, finance manager of the Student Athlete Advisory Committee (SAAC), a member of the Sigma Mu Sigma service fraternity, and more. After graduating in May of 2018, Mr. Kuzjak began his career with Clearsight Advisors in Washington, D.C. as an investment banking analyst. Clearsight is a business services and technology focused investment bank built to advise world-class growth companies.



## **John Leone '91**

Prior to his 2018 departure, John Leone worked with Stevens Capital or its associated companies for 27 years. Mr. Leone was primarily responsible for accessing global exchanges, equity financing structures, and prime broker management. During his career, he has established connectivity to 30+ global exchanges, researched market structure and maintained relationships with global exchanges and brokerages. Current and prior professional associations include: The New York Stock Exchange Institutional Traders Advisory Committee, the Boehly Center

Officers Council, CBOE 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 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 assists banking organizations with a broad range of enterprise risk management practices. Over the last several years, he has assisted banking organizations with their capital management, resolution and recovery planning, risk management and compliance programs. He served as an expert witness in US District Court for the CFTC in a foreign exchange trading case. Projects for his clients have involved travel to Amsterdam, Bangalore, Cannes, Frankfurt, Hong

Kong, London, Melbourne, Paris, Singapore, Stockholm, Sydney and Tokyo. Mr. Maher joined Ernst & Young in 1993 from the Federal Reserve Bank of New York. At the NY Fed, he managed examinations of banking organizations and nonbank subsidiaries. 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 address evolving activities. He headed the NY Fed's field reviews of Banca Nazionale del Lavoro and Bank of Credit and Commerce International. While he was with the Federal Reserve, Mr. Maher was seconded to the IMF for a short term technical assistance project to strengthen the Central Bank of Turkmenistan. Mr. Maher is an Executive Committee member of the Board of the Theodore Roosevelt Council of the Boys Scouts of America. He is the Council's Executive Vice President and leads the Board's nominating committee and compensation and benefits committee. He received his BBA in management at William & Mary in 1979.



**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.



**Thomas B. Mayrhofer '95**  
**EJF Capital, LLC**

Thomas B. Mayrhofer is the Deputy CFO and Deputy COO of EJF Capital, LLC. Mr. Mayrhofer joined EJF in April 2018 and has over 15 years of experience in the financial services industry. EJF is an SEC-registered, employee-owned alternative asset management firm headquartered outside of Washington, DC. EJF manages more than \$6 billion across a diverse group of alternative asset strategies. Prior to joining EJF, Mr. Mayrhofer was a Partner and Managing Director at

The Carlyle Group. In addition to holding the position of Chief Financial Officer of Carlyle's Corporate Private Equity Segment, Mr. Mayrhofer oversaw the operations of all of Carlyle's Private Equity funds and served 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 graduated from William & Mary with a BBA in Accounting and serves on the Advisory Board for William & Mary's Accounting Program.



**Mark McFadden '99**  
**CCMP Capital**

Mark McFadden is a Managing Director in the New York office of CCMP. He focuses on making investments in the industrial sector. 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 CSFB and Bowles Hollowell Conner. Mr. McFadden serves on the board of directors of Hayward and PQ

Corporation, and has been involved in the firm's investments in Generac, Eco Services and Milacron. Mr. McFadden holds a BBA and a BA from William & Mary.



**David Rice '18**  
**Analysis Group**

David Rice earned his BBA from William & Mary in 2018, majoring in Finance with a minor in Chinese Studies. He completed a Monroe Research Project in Kunshan, China in 2016, and returned to China as a business development intern in 2017. He joined the Analysis Group, an economics consulting firm in DC following his graduation.



**Abby Roach '13**  
**Wells Fargo**

Abby Roach, CFA, is a Portfolio Analyst for the Wells Fargo Asset Management (WFAM) LT Equity team. Ms. Roach supports the LT Large Cap Fundamental Equity and LT Large Cap Growth Equity Strategies covering the Consumer Staples and Discretionary sectors. Prior to joining the LT Equity team, Ms. Roach worked as an Investment Management Specialist for Wells Fargo Private Bank, where she supported a team of Senior Investment Strategists. She joined Wells Fargo in 2013 through the Early Talent Development Program, working as an Investment Manager. Ms. Roach graduated from William & Mary in 2013 with a BBA in Finance with a concentration in Accounting and a minor in Mathematics. She earned the right to use the CFA designation and is a member of the CFA Society of Washington, DC.



**Philip Roane '06**  
**Global Payments**

Philip Roane is vice president of corporate development at Global Payments (NYSE: GPN), where he oversees mergers, acquisitions and joint ventures internationally. Previously, he held roles in investment banking and private equity. Mr. Roane graduated Phi Beta Kappa from William & Mary, where he co-founded the Finance Academy, and received an MBA from Harvard Business School.



**Cabell Rosanelli '09**  
**Lyft**

Cabell Rosanelli is a Market Manager at Lyft, based in Richmond, VA. In his role, Mr. Rosanelli is responsible for the company's strategy and operations in Virginia and manages the P&L for the market. Prior to his time at Lyft, Mr. Rosanelli worked as a Senior Associate at Cerberus Capital Management in New York City and as a consultant at Deloitte Consulting. Mr. Rosanelli holds a BA from William & Mary in Economics and Government, an MA from Georgetown University in Political Science, and an MBA from UVA's Darden School of Business.



**Gregory 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 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 William & Mary from 2007 until 2012. He currently lives in Manhattan with his wife, Rebecca, and twin children, Wellesley & Grant.



**Tiffany Thurber '10**  
**Goldman Sachs & Co**

Tiffany Thurber is a Vice President within the Real Estate Financing Group (REFG) at Goldman Sachs. REFG deploys the firm's balance sheet on mortgage and mezzanine commercial real estate lending opportunities for the firm's new-issue commercial mortgage-backed securities (CMBS) business and the firm's bank portfolio. Ms. Thurber's primary responsibilities include originating and structuring large complex mortgage and mezzanine financings. Ms. Thurber earned a BBA in Finance at William & Mary.



**Peter Voth '15**  
**Littlejohn & Co.**

Peter Voth is currently an associate at Littlejohn & Co., a middle market private equity firm based in Greenwich, CT. Littlejohn manages approximately \$7 billion in assets across three investment strategies: private equity, special situations, and performing credit. Mr. Voth is responsible for supporting the strategic and financial goals of current portfolio companies as well as evaluating new investment opportunities. Prior to joining Littlejohn in July 2017, Mr. Voth was an investment banking analyst at Perella Weinberg Partners in New York, where he worked on mergers, acquisitions, and restructurings across a number of industries. Mr. Voth graduated 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.

**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 utility-scale solar projects. In 2017, he joined the corporate M&A team and was involved in a variety of deals including the pending acquisition of SCANA Energy, and the divestitures of DE's retail home warranty business, midstream processing venture, and merchant generation facilities. He left DE in August to begin law school at the University of Virginia, and plans to return to finance in the long-term. Mr. Yates also has a passion for outdoor activities, particularly cycling, surfing, and skiing. He instructs skiing at Wintergreen Resort when free time permits.

# Faculty Moderators

**Julie Agnew** is the Richard C. Kraemer Chair and Class of 2018 Professor of Finance and Economics. From 2014 until 2016, she was the Inaugural Director of the Boehly Center for Excellence in Finance at William & Mary's Mason School of Business. She is a TIAA Institute Fellow, on the Advisory Board of the Wharton School's Pension Research Council, a former elected member of the Defined Contribution Plans Advisory Committee (DCPAC) for the Virginia Retirement System, and a Research Associate for the Center for Retirement Research at Boston College. She is also an Associate Investigator for the ARC Centre of Excellence in Population Ageing Research (CEPAR) in Australia and a member of the Academic Advisory Council (AAC) of the DCIIRA Retirement Research Center (RRC). Additionally, she is a board member of C&F Bank. From 2009-2011, she was the Co-Director of the Center for Interdisciplinary Behavioral Finance Research.

**David Long** received his PhD in organizational behavior from the University of Florida's Warrington College of Business Administration. He holds a BS in business administration from Presbyterian College, and an MBA from the University of Florida. Professor Long's research examines various approaches to impression management, including how employees use impression management to build their reputations, and how supervisors (and coworkers) react to these employees and their strategies. His work has appeared in several journals and books, including the *Academy of Management Journal*, *Journal of Applied Psychology*, *Personnel Psychology*, and *The Nature of Leadership*. Prior to earning his PhD, Professor Long served in the US Navy as a naval flight officer, and worked at The Home Depot in business development and store management. He currently serves in the US Navy Reserves, most recently as a mission commander and flight instructor.

**Hugh Marble III** joined William & Mary in 2015 as a Clinical Assistant Professor of Finance in the Mason School of Business. Before coming to William & Mary, he served on the faculty at the University of Vermont. Professor Marble earned his PhD in finance from the University of Florida. Prior to pursuing the PhD, Hugh worked as a consultant at firms that advised public sector entities on debt financing and capital planning. Professor Marble is a CFA charter holder and an active volunteer for the CFA Institute.

**John Merrick** is the Richard S. Reynolds Professor of Business at the Mason School of Business. He has split his professional career between academia and Wall Street. He worked for six years at Lehman Brothers in fixed income derivatives research, product management, and proprietary trading. He spent five additional years in global fixed income portfolio management and the hedge fund trade advisory business. Professor Merrick came to William & Mary in 2005 from Baruch College, where he had spent four years after a second stint on the faculty of the Stern School of Business at New York University. He has also been a visiting scholar at the Federal Reserve Bank of Philadelphia and a consultant to the World Bank.

**Carl Tack** is a Visiting Lecturer in Finance at the Mason School and currently serves as Co-Director of the Boehly Center and as Faculty Advisor to the Financial Literacy Program. Professor Tack is a graduate of William & Mary (Economics 1978) and the University of Chicago Law (JD 1981). Professor Tack teaches courses in financial institutions and corporate finance at the undergraduate and graduate (MBA) levels. He has previously taught at London Business School (London and Dubai), Imperial College London and the W&M Law School. He serves as a board member of the Tredegar Corporation, Richmond, where he has been a member of the audit, governance, compensation, and strategic finance committees.

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