

13th Annual

FROM DOG
STREET
to

WALL STREET

Event Program &
Panelist Biographies

Miller Hall | Sept. 26-27

13TH ANNUAL FROM DOG ST. TO WALL ST.

Thursday, September 26, 2019

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



Kendrick F. Ashton Jr. '98

Kendrick Ashton is the Co-Founder and Managing Partner of The St. James Group, a leading developer and operator of sports, wellness, hospitality and active brands and destinations. Prior to founding The St. James Group, Mr. Ashton was a founding member and Managing Director of Perella Weinberg Partners, a boutique financial services firm founded in 2006 by Joseph Perella and Peter Weinberg. From 2009 to 2011, he served as Chief Operating Officer of the Firm's Corporate Advisory Business. Prior to joining Perella Weinberg, Mr. Ashton was an investment banker at Goldman, Sachs & Co. and gained legal experience at Cravath, Swaine & Moore and Wachtell, Lipton, Rosen & Katz. Mr. Ashton received a Juris Doctorate from the University of Chicago Law School, where he was a Merit Scholar and the Earl Dickerson Public Service Scholar, and a Master

of Business Administration from the University of Chicago Graduate School of Business, where he was also a Merit Scholar. He earned his BA from William & Mary, where he was a member of the Dean's List, an all-conference cornerback and received the William & Mary Quarterback Club's President's Award, the John Kratzer Memorial Award for Exemplary Courage, Self-Sacrifice, Leadership and Spirit, and the Benjamin Stoddert Ewell Award for Outstanding Leadership in Campus and Community Activities and for Service and Contribution to the College. In 2009, the Board of Directors of the College's Alumni Association awarded Mr. Ashton the Young Alumni Service Award for his service and commitment to William & Mary. Mr. Ashton is a member of the Board Trustees of the Colonial Williamsburg Foundation, the Board of Trustees of the National Urban League, the Board of Directors of Archbishop John Carroll High School, and the Board of Directors of Bellwether Education Partners and is an emeritus member of the Board of Visitors and Foundation Board of the College of William & Mary.

Friday, September 27, 2019

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 – Private Equity Session 3 – Strategy Consulting
11:15am-12:15am	Session 1 – Sales and Trading Session 2 – Asset Management Session 3 – Corporate Finance
12:30pm-1:30pm	Session 1 – Venture Capital/Start Ups Session 2 – Risk Management Session 3 – Wealth Management

Closing Session: Brinkley Commons

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

PANELIST BIOGRAPHIES



Karim Ahamed '79 Cerity Partners LLC

Karim Ahamed is a partner and investment advisor in the Chicago office of Cerity Partners, a leading independent wealth management firm serving the complex needs of wealthy families, corporate executives, business owners, and charitable organizations. In addition to his client responsibilities, Mr. Ahamed is a member of the investment committee and head of the firm's manager selection activities. Additionally, in his role as investment strategist for the firm, Mr. Ahamed authors the firm's market outlook, identifies key investment themes and trends to be expressed in client portfolios, and helps to develop and implement the firm's strategic and tactical positioning for portfolio management. Prior to joining Cerity Partners, Mr. Ahamed was a managing director and senior investment specialist with J.P. Morgan Private Banking, where he was ranked among the nation's top investment advisors by Barron's magazine. Earlier in his career, Mr. Ahamed held senior investment and wealth management positions with Coutts & Co. and UBS AG in the UK. 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 and member of the CFA Institute, CFA Society of Chicago and CFA Society of the UK. Mr. Ahamed serves on the boards, and professional advisory committees of several non-profit organizations focused on arts, education and economic development. An avid supporter of the Mason School of Business, he currently chairs the investment committee of the Mason School of Business Foundation board. Additionally, Mr. Ahamed is a regular participant in DoG Street to Wall Street and has been part of the highly-ranked Applied Financial Concepts course since its inception.



Craig Broderick '81
Goldman Sachs

Craig Broderick is a Senior Director of Goldman Sachs & Co., from which he retired as an active employee in January 2018. He was until then, the firm's Chief Risk Officer, a member of its Management Committee, and chair or co-chair of key risk committees. In this capacity he reported to the firm's CEO and was responsible for managing the firm's Risk Division. The Division oversees control of the firm's credit, market, liquidity, operational, model and insurance risks. He spent 32 years with Goldman Sachs, primarily in the risk field. Prior to that he was

a lending officer at the Chase Manhattan Bank, and attended its Credit Training program. Mr. Broderick also currently serves as a Senior Advisor to the Stone Point Capital private equity firm, and as a board member of StreetSquash, a NY-based urban youth enrichment program. He is active with his alma mater including serving for nine years as a Trustee of the William & Mary Foundation and was chair of its Investment Committee. He holds a BA in Economics from William & Mary.



Matt Buckley '18
Capital One

Matt Buckley is a senior associate on the Corporate Development team at Capital One in McLean, Virginia. He evaluates and executes on mergers, acquisitions, joint ventures, partnerships, and divestitures across the technology and financial services sectors. Prior to Capital One, Mr. Buckley was an analyst at JP Morgan in New York, where he advised mid-cap financial institutions on mergers, acquisitions, and capital markets transactions. He graduated from William & Mary in 2018 with a BBA in Finance.



Chris Connolly '15
Morgan Stanley

Chris Connolly is an Associate in the Investment Banking Division at Morgan Stanley in New York. Mr. Connolly is a member of the Transportation and Infrastructure group and advises companies on M&A, debt, and equity capital markets transactions in the airline, logistics, trucking, shipping, rail, travel, leasing, and infrastructure sectors. Prior to his current role, Mr. Connolly worked in Firm Management on the Chief of Staff team for the President of Morgan Stanley. Mr. Connolly joined the Firm as an Analyst in the Public Finance investment banking group. Mr. Connolly graduated Cum Laude

from William & Mary in 2015 with a BA in Government and a minor in Finance.



Brij Dhanda '16
Ezra Digital

Brij Dhanda is CEO of Ezra Digital, a Design Agency which has created websites for brands including Adobe, University of Pittsburgh, and UPMC Health Network. Prior to taking the helm at Ezra Digital, Mr. Dhanda served as a Business Analyst with McKinsey & Company in the Pittsburgh office. During his tenure at McKinsey, Mr. Dhanda focused on projects in the Retail, Automotive, and Private Equity helping clients with pricing, promotion, and merger integration. Mr. Dhanda graduated from William & Mary with a BBA in Finance and a concentration in Entrepreneurship.



Alexandra Diemer '19
Ayco, a Goldman Sachs Company

Allie Diemer is a Financial Analyst at Ayco, a Goldman Sachs Company in Dallas, Texas. Ayco is a national leader in company-sponsored financial counseling, investment management, and family office services. Ms. Diemer graduated from William & Mary in 2019 with a BBA in Accounting, a concentration in Finance, and a minor in Psychology. At William & Mary, she was the Chief Development Officer for Smart Woman Securities, the Alumni Engagement Director for her social sorority, and a member of Students for University Advancement.



Conor Donovan '15
New Mountain Capital

Conor Donovan is currently an associate at New Mountain Capital, a private equity firm with over \$20 billion assets under management. Prior to joining New Mountain in August 2017, Mr. Donovan was an investment banking analyst in the Mergers & Acquisitions group at Morgan Stanley. Mr. Donovan graduated Summa Cum Laude from William & Mary with a BBA in Finance, an Accounting concentration, and an Economics minor.



Abbey Doski '16
Bain & Company

Abbey Doski is currently obtaining her MBA from the Kellogg School of Management at Northwestern University, after which she will return as a Consultant to Bain & Company, a global consulting firm, in their Atlanta, Georgia office. In her three years at Bain prior to business school, Ms. Doski worked on projects in Industrial Goods & Services, Financial Services, Insurance and Private Equity, helping clients on topics including future strategy, merger integration, program management, and Agile execution. 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. This spring, Ms. Doski completed a three-month externship at Sonder, a growing Hospitality tech startup, assisting the Nashville, TN team with the launch of their first hotel. Ms. Doski graduated from William & Mary in 2016 with a BBA in Finance and a minor in Psychology.



Claire Duchene '18 MSBA '19
Clearsight Advisors

Claire Duchene is an investment banking analyst with Clearsight Advisors in Washington, DC and a two-time graduate from William & Mary, first with a BBA in 2018 followed by an MSBA in 2019. She majored in Finance during her undergrad career before pursuing a Master of Science in Business Analytics. During Ms. Duchene's time at William & Mary she was a member of a number of extracurricular organizations, including the Varsity women's lacrosse team, while also serving on the board of Smart Woman Securities, and volunteering for Tribe Tutors. After graduating in May of

2019, Ms. Duchene began her career with Clearsight Advisors in Washington, DC as an investment banking analyst. Clearsight is a business services and technology focused investment bank built to advise world-class growth companies.



Thomas Foreman '19
Harris Williams

Thomas Foreman is an investment banking analyst in the Healthcare and Life Sciences Group at Harris Williams. At Harris Williams, Mr. Foreman helps advise on a variety of sell-side M&A transactions across a range of healthcare industries. Mr. Foreman graduated Magna Cum Laude from William & Mary with a BBA in Finance, a Marketing concentration, and a Chinese minor. At William & Mary, he was involved in the Finance Academy, Greek Life, and Club Basketball.



Becca Gildea '12
Ernst & Young

Becca Gildea is a Manager at Ernst & Young (EY) and provides consulting services to Treasury departments in financial service institutions. Based out of New York, she participated in the Business Advisor Program after graduating from William & Mary in 2012 with a major in Accounting and a concentration in Finance. Five years ago, Ms. Gildea aligned to the Treasury and Liquidity Risk Advisory practice where she has focused on helping financial institutions to develop liquidity and capital management frameworks, including funds transfer pricing and stress testing among other focus areas.

While working for EY, the company sponsored Ms. Gildea to attend Wharton's Executive MBA program at the University of Pennsylvania where she obtained her MBA in May '19.



Will Glass '07
Perella Weinberg Partners

Will Glass is a Managing Director at Perella Weinberg Partners, covering healthcare companies. Previously, Mr. Glass worked in corporate development at AIG's Financial Services Division, and as an investment banker at Bear Stearns covering technology, media and telecom. Mr. Glass graduated Summa Cum Laude from William & Mary with a BA in International Relations and Finance.



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.



Gunnar Gregory '11
Vancery

Gunnar Gregory is the Founder and CEO of Vancery, a professional exchange that connects industry leaders. After graduating from William & Mary in 2011, Mr. Gregory worked in investment banking at Goldman Sachs. Following that, he was an investor in a long/short hedge fund. In 2018, he founded technology start up Vancery and serves as its CEO.



Brian Hiestand
William & Mary Foundation

Mr. Hiestand joined the 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 BS and MBA from Bowling Green State University



Jad Howell MAcc '05
USAA Real Estate

Jad Howell is an Executive Director at USAA Real Estate. He serves as the Associate Portfolio Manager for the USAA Eagle Real Estate Fund, the firm's \$4 billion diversified, open-ended commingled real estate fund focused on generating long-term Core-plus returns through a variety of strategies. Prior to joining USAA Real Estate, Mr. Howell worked for a multibillion-dollar private endowment, managing its commingled fund positions and select commercial and multifamily investments. Mr. Howell received his Master of Science in Accounting and Bachelor of Arts in Finance from William & Mary and The University of Utah, respectively. He is a Certified Public Accountant, Certified Commercial Investment Member, and is a member of numerous finance and real estate industries.



Eric Kauders '91

Bank of America Private Bank

Eric Kauders is a Managing Director and the Trust Executive for the Mid-Atlantic Market of Bank of America Private Bank, 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, volunteers with a number of other non-profit organizations, 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.



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.



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 ~\$10 billion for a non-profit institutions and was founded by a team from Duke University and The Duke Endowment. At GEM, Mr. Kocher is responsible for client communication, strategic engagement, and business development. Mr. Kocher 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 Global Endowment in July 2014, Mr. Kocher 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.



Roma Korkmazsky '11

JP Morgan

Roma Korkmazsky is a Vice President and Investment Specialist at JP Morgan's Private Bank. In this capacity, he provides customized investment solutions, builds portfolios, and provides tailored advice to wealthy individuals and families across the tri-state area. Prior to his current role, Mr. Korkmazsky advised Private Bank clients located primarily in New Jersey on aspects of investments, banking, and estate planning. He began his career working with corporations to manage foreign currency exposure through derivative risk management. Mr. Korkmazsky is a graduate of William &

Mary where he earned a BBA in Finance and Accounting. He is a CFA charterholder and a member of the CFA Institute. He currently lives in New York City and enjoys running, traveling, reading, and rooting for The Yankees.



John Leone '91
Wells Fargo

John Leone is a Managing Director and Head of Quantitative Strategy for Wells Fargo. Prior to his 2018 departure from the firm, 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 Traders 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 retired from Ernst & Young (EY) on June 30, 2017. He has been retained by EY as a senior advisor to assist banking organizations with a broad range of enterprise risk management practices. He focuses on critical transformation projects covering capital management, risk management and compliance programs. Projects for his clients have involved travel to Amsterdam (Breda), 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. He headed the NY Fed's investigations of Banca Nazionale del Lavoro and Bank of Credit and Commerce International. Mr. Maher was seconded to the IMF for a short term technical assistance project to strengthen the Central Bank of Turkmenistan. For the last twenty years, Mr. Maher has been involved with the Theodore Roosevelt Council of the Boys Scouts of America as a Board Member, Scoutmaster and Committee Chair. He is an independent director and member of the audit committee of Sumitomo Mitsui Trust Bank (U.S.A.) Limited. He received his BBA in Management at William & Mary in 1979.



Laura Markley '07, MAcc '08

NRV

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 Mayrhofer '95

EJF Capital LLC

Thomas B. Mayrhofer is the CEO and Deputy COO of EJF Capital, LLC. Mr. Mayrhofer joined EJF in 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 \$10 billion across a diverse group of alternative asset strategies, including hedge funds, private equity funds, and securitization vehicles. Prior to 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.



Abby Roach '13

Wells Capital Management/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, 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.



Harrison Roday '13
American Industrial Partners

Harrison Roday graduated Magna Cum Laude from William & Mary in December 2013 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. He grew up in Richmond, Virginia and currently works at American Industrial Partners, a group of engineering-centric operating and financial professionals focused on investing in 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. Prior to joining AIP, Mr. Roday worked as an analyst for Morgan Stanley. In 2012, he was the Advance Director for Kaine for Virginia. He is in his sixth year working with New York City public school students; currently, he volunteers with Minds Matter, a non-profit dedicated to improving college preparation and accessibility for underserved students. Mr. Roday is also a member of the W&M Washington Center Advisory Board, sitting on its Executive Committee.



Cabell Rosanelli '09
Lyft

Cabell Rosanelli is a Senior Manager on Lyft's Corporate Strategy team. He is responsible for managing strategy and operations in the company's East region, with a focus on driving impact through cross-functional efforts that affect bookings, revenue, and cost. Prior to Lyft, Mr. Rosanelli was a Senior Associate at Cerberus Capital Management. Mr. Rosanelli began his career in management consulting. He holds a BA, Economics / Government from William & Mary, an MA, Political Science from Georgetown University, and an MBA from The Darden School of Business.



Gregory Shenkman '03
Shenkman Capital Management

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.



Matthew Siano, Esq. '96
Two Sigma Investments, LP

Matthew B. Siano, Esq. is Managing Director, General Counsel of Two Sigma Investments, LP, Two Sigma Advisers, LP and Two Sigma Investor Solutions, LP, a trio of global investment managers specializing in quantitative investing across a broad range of asset classes, as well as their other US and non-US affiliates. Two Sigma and its various affiliates currently manage numerous hedge funds, private investment pools, registered funds and managed accounts with over \$56 billion in assets under management. As Two Sigma's General Counsel, Mr. Siano is responsible for the firm's legal, regulatory, compliance and government affairs matters and is the head of both their legal and compliance departments. Mr. Siano joined Two Sigma in July 2004. Mr. Siano graduated Cum Laude from William & Mary in Virginia in 1996 with a BA in Government and History. While in Williamsburg, he also minored in Religion and published an honors thesis on the New York City public school system. In 1999, Mr. Siano earned a JD from Fordham Law School, where he was the Special Publications Editor for the Urban Law Journal and a member of the Fordham Moot Court Board. Mr. Siano is also an adjunct in the Mason School of Business, the undergraduate business school of William & Mary in Virginia, where he teaches a seminar course on the management of hedge funds. He has also been an active industry speaker at events hosted by the American Bar Association, Bloomberg, the Corporate Lawyering Association, Fordham Law School, the International Bar Association, PLI, the RCA and various US and international law firms.



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 \$10 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 private equity portfolio investments 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.

Faculty Moderators

Julie Agnew is the Richard C. Kraemer Term 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 DCIIA 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.

James Haltiner is Professor Emeritus of Finance at the Mason School of Business. During his career, Professor Haltiner taught core financial management classes in the Flex MBA Program and Executive MBA Program and investments/portfolio electives in the BBA Program. He also provided oversight of the MBA student managed equity portfolio, "The Batten Fund", and the undergraduate "SMIF" Portfolio. In 2004, he was named the Frank Batten Professor for Distinguished MBA Teaching and in 2007 was named Chancellor Professor of Business. In 2012 he was awarded the Dungan Teaching Fellowship Award for innovations and excellence in the undergraduate program. Professor Haltiner is a former Director of the MBA Program and former Co-Director of the Boehly Center for Excellence in Finance. He has consulted with or served as an expert witness for a number of public and private organizations about financial valuation, financing, investors' opportunity cost of capital, and in matters of utility rate regulation. He is currently a member of Riverside Health Care System's Asset Management Committee and a former member of the state of Virginia's pension fund Investment Advisory Committee.

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, Faculty Advisor to the Financial Literacy Program, and former Co-Director of the Boehly Center for Excellence in Finance. 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.

Howard J. Busbee

Finance Academy Officers

2019

MIKE MURATORE '20

President

NOORA ABDEL-FATTAH '20

Vice President

JASON LEE '20

Vice President

MADISON DILENGE '20

Vice President

JAKE LIPMAN '20

Vice President

CAITLYN FARR '20

Vice President

ADAM O'CONNELL '20

Vice President

RAMAN KHANNA '21

Vice President

MURRAY RYAN '20

Vice President

HOWARD J. BUSBEE
FINANCE ACADEMY

SPONSORED BY:

HOWARD J. BUSBEE _____
FINANCE ACADEMY



Raymond A. Mason
School of Business
WILLIAM & MARY

THE
BOEHLY CENTER

FOR EXCELLENCE IN FINANCE



WILLIAM & MARY
COHEN CAREER CENTER