Raymond A. Mason School of Business
WILLIAM & MARY

THE BOEHLY CENTER
FOR EXCELLENCE IN FINANCE

HOWARD J. BUSBEE FINANCE ACADEMY

WILLIAM & MARY
CHARTERED 1693
OFFICE OF CAREER DEVELOPMENT & PROFESSIONAL ENGAGEMENT

17TH ANNUAL

FROM DoG STREET TO WALL STREET

Finance Career Exploration Conference

In Memory of Howard J. Busbee

Event Program & Panelist Biographies

SEPT. 7 - SEPT. 8, 2023

ALAN B. MILLER HALL

boehly.center@mason.wm.edu

boehlycenter.mason.wm.edu

17TH ANNUAL

D2W

FROM DoG STREET TO WALL STREET

2023

Thursday, September 7th, 2023

Alan B. Miller Hall

Day One Schedule

Brinkley Commons

6:00 - 6:10 Introductions & Howard J. Busbee Award

6:10 - 6:50 Co- Keynote Address

Jessica (McAnneny) Burt '02

Head of Global Platform and Business Strategy for BlackRock Investment Stewardship

William Burt '00

Chief Operating Officer for Galaxy Asset Management

6:50- 7:00 Closing Remarks

About From DoG Street to Wall Street (D2W)

D2W is sponsored by the Boehly Center for Excellence in Finance, the Career Development & Professional Engagement Center, and the Howard J. Busbee Finance Academy, a student organization that connects W&M undergraduates with finance professionals. Each year, over 40 alumni and friends help interested scholars learn more about careers in finance through panel discussions and presentations.

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Friday, September 8th, 2023
Alan B. Miller Hall

Day Two Schedule

8:15 - 9:00 Check-in + Breakfast

9:00 - 9:50 Early Career Success + Finance 101

Individual concurrent sessions
***Early Career Success is recommended for upperclassmen and Finance 101 is recommended for underclassmen*

10:00 - 10:50 Investment Banking

Group session

11:00 - 11:50 Corporate Finance + Sales & Trading/ Quantitative Finance

Individual concurrent sessions

12:00 - 12:45 The Howard J. Busbee Finance Academy Networking Luncheon

1:00 - 1:50 Asset/ Wealth Management + Venture Capital/ Entrepreneurship

Individual concurrent sessions

2:00 - 2:50 Consulting + Private Equity/ Hedge Funds

Individual concurrent sessions

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FROM DOG STREET TO WALL STREET 2023

Thursday, September 7

6:00pm	Introduction & Howard J. Busbee Finance Academy Award, *Brinkley Commons*	
6:10pm	Keynote Address, *Brinkley Commons*	
	Jessica (McAnneny) Burt '02, *BlackRock*	William Burt '00, *Galaxy Asset Management*
6:50pm	Closing Remarks, *Brinkley Commons*	

Friday, September 8

8:15am	Check-in & Breakfast, *Undergraduate Lounge*	
9:00am	**Early Career Success, *Room 1088*** **Co-sponsor: Alpha Kappa Psi** Targeting students with past work experience, this panel will discuss how students can set themselves apart early in their careers.	**Finance 101, *Brinkley Commons*** **Co-sponsors: Financial Literacy Program, Peer Mentorship Program** Designed for students wanting to learn the basics about different finance careers, this panel will expose students to several different career options.
	Daniel Barzach '13, *Tiger Global Management* Garrett Curtiss '21, *RBC Capital Markets* Klaudia Kasztelaniec '09, *McKinsey & Company* Ed McGann '82, *BNY Mellon*	Alex Kocher '12, *Global Endowment Management* Greg Pieroni, *UBS* Abbey Reece '16, *Greathouse Remodeling* Philip Roane '06, *Experienced Financial Professional*
9:50am	***Break***	
10:00am	**Investment Banking, *Brinkley Commons*** This highly interactive session begins with a 10-minute overview of investment banking followed by small group discussions with investment bankers. By the end of the session, students will have had the opportunity to meet several different types of investment bankers. Come ready to talk.	
	Daniel Barzach '13, Tiger Global Management Michaela Diverio '07, Barclays Alex Don '17, MUFG Bank, LTD Aaron Hurwitz '08, The Carlyle Group Greg Melich '92, Evercore ISI Nandhini Nallamotu '23, RBC Capital Markets	Vitoria Okuyama '21, Citi Philip Roane '06, Experienced Financial Professional Russell Schmidt '07, Morgan Stanley Erwin van der Voort, RBC Capital Markets, LLC Jarrett Walker '13, J.P. Morgan Chris Williams '06, Motive Partners
10:50am	***Break***	
11:00pm	**Corporate Finance, *Room 1088*** **Co-sponsor: TAMID Group** Ever wonder what type of jobs exist inside a corporation, come to this session to learn about the different options.	**Sales & Trading/ Quantitative Finance, *Room 1082*** Are you great with numbers? In this panel you will learn about working in fast-paced sales and trading and quantitative finance careers.
	Matt Heist '91, *Slack-Salesforce* Philip Roane '06, *Experienced Financial Professional*	Hilary Corman, *State Street Global Advisors* John Ellison '08, *Richmond Quantitative Advisors* Ryan Sells '07, *Dash Fund* Gregory Shenkman '03, *Shenkman Capital*
12:00pm	**Howard J. Busbee Finance Academy Networking Luncheon, *Brinkley Commons*** Practice your networking skills with successful alumni. Panelists from ALL of the sessions will be at this lunch looking forward to talking to you. They will be sitting in	
12:50pm	Group Photo, *Miller Hall First Floor Atrium*	
1:00pm	**Asset & Wealth Management, *Brinkley Commons*** **Co-sponsor: W&M Mason Investment Club** Learn about asset management including managing money for high-net worth individuals and endowments.	**Venture Capital & Entrepreneurship, *Room 1088*** **Co-sponsor: W&M Entrepreneurship Center** Learn about creating your own start-up and investing in new ventures from alumni who have done it all.
	Hilary Corman, *State Street Global Advisors* Theresa Dugan Hinkley '14, *J.P. Morgan* Lauren Jacobson '07, *Hamilton College* Alex Kocher '12, *Global Endowment Management*	Yael Kaufmann '11, *Learn In* Francis Lyons '93, *OOPOLL, INC* Ryan Sells '07, *Dash Fund*
	Break	
2:00pm	**Consulting, *Brinkley Commons*** **Co-sponsor: W&M Consulting Club** Structured like the i-banking panel, hear a 10-minute overview of the different types of consulting careers and then meet in small groups with different consultants.	**Private Equity/ Hedge Funds, *Room 1088*** **Co-sponsor: Smart Woman Securities** What do people do who work in private equity and at hedge funds? Attend this panel to learn more about these career paths.
	Clark Agnew, Ernst & Young Scott Gehsmann '84, *PWC* Freddy Giaever '18, *PWC* Ann Marie Higgins '06, *Ernst & Young* Klaudia Kasztelaniec '09, McKinsey & Company Molly Pieroni '90, Yacktman Asset Management (Former BCG) Abbey Reece '16, *Greathouse Remodeling* (Former Bain) Trevor Reece, *Ronald Blue Trust* (Former McKinsey & Company) Chris Robinson '05, *Deloitte & Touche LLP* Charley Sherman '20, *McKinsey & Company* Jack Spencer '21, *West Monroe Partners*	Daniel Barzach '13, *Tiger Global Management* Aaron Hurwitz '08, *The Carlyle Group* Philip Roane '06, *Experienced Financial Professional*

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KEYNOTE SPEAKER

JESSICA (MCANNENY) BURT '02

HEAD OF GLOBAL PLATFORM AND BUSINESS STRATEGY FOR BLACKROCK INVESTMENT STEWARDSHIP

BLACKROCK

Jessica K Burt, Managing Director, is responsible for the global platform and business strategy for BlackRock Investment Stewardship (BIS), overseeing daily operations and strategic initiatives for BIS. Ms. Burt also heads the Voting Platform enabling institutional clients to vote their shares. Previously, Ms. Burt was the Global COO and lead business strategist of Fixed Income and Sustainable ETFs within the ETF and Index Investments business. During her tenure she led strategic initiatives to grow the adjacent marketplace to Fixed Income ETFs. Just prior to her time in the ETF and Index Investment business, Ms. Burt was the Global COO of the Trading and Liquidity Strategies team as well as the Investment Platform unit. Her work spanned across trading, securities lending, cash and cross-platform strategic initiatives within the Investment Platform umbrella. Ms. Burt was a member of BlackRock's Platform and Innovation team responsible for the Americas Corporate and Risk practice area. She specifically focused on re-shaping, leading, and implementing regulatory change across the firm (i.e. Money Market Fund Reform, the Volcker legislation, and Central Clearing of derivatives under Title VII of the Dodd Frank Act). Prior to joining BlackRock in 2005, Ms. Burt was part of the Analytics department at Bloomberg, LP where she focused on CDS and MBS product builds and client training. Ms. Burt earned a BBA in Finance from The College of William and Mary with a minor in Government.

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KEYNOTE SPEAKER

WILLIAM BURT '00

CHIEF OPERATING OFFICER

GALAXY ASSET MANAGEMENT

William Burt is the Chief Operating Officer of Asset Management overseeing day-to-day operations. Prior to joining Galaxy, William was a Managing Director and Chief Operating Officer of the Portfolio Solutions group at Blackstone Alternative Asset Management. He was also actively involved in performing non-investment due diligence on underlying hedge fund and direct investments. Prior to joining Blackstone in 2011, William worked at McKinsey & Company, advising clients on strategic and organizational issues with a focus on operations and cost savings. Earlier in his career, William worked at Arthur Andersen LLP in the Assurance and Business Advisory practice. He received a BBA in Accounting from the College of William and Mary, where he graduated with distinction and an MBA from the Tuck School of Business at Dartmouth.

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PANELISTS

DANIEL BARZACH '13

PARTNER
TIGER GLOBAL MANAGEMENT

Dan Barzach is a Partner at Tiger Global focused on investments in the consumer and internet sectors. Prior to joining Tiger Global, he worked in Private Equity at Apollo and in M&A at Morgan Stanley. Dan graduated from The College of William & Mary with a BBA in Finance and lives in NYC.

HILARY CORMAN

HEAD OF US INSTITUTIONAL, SPDR ETF'S
STATE STREET GLOBAL ADVISORS

Hilary Corman is the US Head of Institutional for SPDR ETF's, a division of State Street Global Advisors. Ms. Corman joined SPDR in 2020 and is responsible for Institutional SPDR ETF distribution to all Institutional channels. These include Asset Managers, Hedge Funds, Single Family Offices, Pensions, Endowments, Foundations, OCIO's, and Insurance. Previously Ms. Corman was the interim Co-Head of Institutional at iShares for Blackrock. Ms. Corman joined BlackRock in 2013 with over 20 years of experience in investment banking, institutional equity brokerage and indexing. She began at the firm as Co-Head of the Asset Manager/ETF Strategist/Hedge Fund & Family Office channel in iShares. In 2014 she became Head of the channel and in 2016 was asked to be interim Co-Head of the Institutional Business. Before joining BlackRock she was a Senior Managing Director in charge of US Equity Sales at Guggenheim Securities. Prior to being recruited by Guggenheim, Ms. Corman was the North American Regional Head of Equity Sales at Markit NA, a financial data and Technology Company (now SPGI). At Markit NA, Ms. Corman was key to developing and selling a premier ETF solutions product as well as building the Equity business for the firm. Prior to that, Ms. Corman was a Managing Director at Bank of America Securities where she ran a northeast sales team until she was promoted to Senior Relationship Manager in 2007. Prior to Bank of America, Ms. Corman worked in both New York and London for Citigroup and JP Morgan in Global Equities in both Sales and Management capacities. Ms. Corman was named one of the 50 most influential women in Private Wealth in 2016. She holds a BSBA from Georgetown University in Finance and International Business and an MBA from Columbia Business School in Finance and Accounting.

GARRETT CURTISS '21

ANALYST
RBC CAPITAL MARKETS

Garrett Curtis is a Corporate Banking Analyst at RBC Capital Markets with sector expertise in Healthcare and Consumer & Retail. His team is responsible for loan origination to Corporate and Sponsored clients offering term loans, revolving credit facilities, warehouse facilities and bridge loans. Prior to joining the bank, Garrett graduated from William and Mary in May '21 with a BA in Finance.

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PANELISTS

MICHAELA DIVERIO '07

HEAD OF CONSUMER RETAIL ECM
BARCLAYS

Michaela Diverio is a Managing Director in Equity Capital Markets at Barclays. Ms. Diverio is responsible for leading equity capital markets transactions for companies in the consumer and retail sectors, as well as those in consumer-facing technology. She has over 15 years of experience in investment banking. Prior to joining Barclays in 2020, Ms. Diverio held various roles in ECM at Goldman Sachs and Morgan Stanley. Ms. Diverio has played a key role in the execution of many IPOs and direct listings for high-profile companies including Duckhorn, Michael Kors, Spotify, Snap, Farfetch, Redfin and Olaplex. Ms. Diverio holds a BBA from The College of William & Mary. She lives in Connecticut with her husband and three daughters.

ALEX DON '17

VICE PRESIDENT
MUFG BANK, LTD.

Alex Don is a Vice President in MUFG's Corporate & Investment Bank managing a portfolio of ~40 clients in the Industrials and Chemicals vertical, with a sector focus in Specialty Chemicals & Materials. Alex's primary responsibilities include i) the advising and structuring of corporate M&A and bank debt, ii) managing client relationships in the Investment Grade and High-Yield corporate space, iii) strengthening MUFG's relationships with select Private Equity firms and their related portfolio companies, and iv) new client acquisition. Alex completed MUFG's Summer Analyst Program in 2016 and joined full-time in 2017, completing MUFG's Global Analyst Program in 2 years which culminated in a 2-month rotation in Tokyo. Alex graduated from William and Mary in 2017 with a Bachelor's Degree in Process Management & Consulting and a Concentration in Finance, and holds all of his respective Investment Banking licenses.

THERESA DUGAN HINKLEY '14

VICE PRESIDENT
J.P. MORGAN

Theresa is a Vice President at the J.P. Morgan Private Bank for the Financial Sponsors Group based in New York. In this capacity, Theresa is responsible the investment efforts of the Financial Sponsors Group to provide comprehensive and holistic wealth planning and investment advice to senior founding private equity partners and their families. With over a decade of investment experience, Theresa works closely with senior private equity partners and their families, advising them on strategic and tactical asset allocation, risk management, and multi-asset class investment strategies. Theresa has earned the Chartered Financial Analyst designation and a BA from The College of William & Mary. She is a member of the CFA Institute. Theresa currently resides in Brooklyn, New York with her husband, a fellow William and Mary alum. While at William & Mary, Theresa was active in the Howard J. Busbee Finance Academy and the Chi Omega sorority.

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PANELISTS

JOHN ELLISON '08

MANAGING DIRECTOR
RICHMOND QUANTITATIVE ADVISORS

John leads RQA's investment operations and is responsible for the oversight and management of the firm's strategies and portfolios. John is a CFA Charterholder, member of the CFA Institute, and a graduate of William & Mary with a Bachelors degree in Finance. John has spent over a decade developing and managing quantitative based investment strategies. Prior to founding RQA, John spent five years executing mergers and acquisitions, debt and equity capital formation and financial valuation at Matrix Capital Markets Group, Ewing Bemiss & Co, and Turning Basin Capital. John began his career as an Equity Research Analyst at BB&T Capital Markets, where his research team was awarded the 2013 Financial Times' Starmine Awards for #1 Top Stock Pickers and #2 Top Earnings Estimators. In addition to his role at RQA, John sits on the board of the Virginia Chapter of the CFA and regularly guest lectures in the area of quantitative finance at the University of Richmond and VCU.

FREDDY GIAEVER '18

VALUATIONS MANAGER
PWC

Freddy is a manager in PwC's Deals Valuation Practice based in Washington, D.C. Freddy has over five years of experience in financial advisory services and has advised clients on all aspects of valuing businesses, assets and liabilities, and mergers & acquisitions across a number of industries. Freddy has developed extensive experience in performing deal models, impairment analyses, purchase price allocations, tax valuations, and strategic value consulting to unlock shareholder value.

MATT HEIST '91

VICE PRESIDENT- CORP FINANCE AND BUSINESS OPERATIONS
SLACK-SALESFORCE

Matt Heist, VP, Finance & Business Operations Matt is a finance professional with over 25 years of experience leading finance and business operations teams in a variety of roles in the consumer internet and software industries. Currently, Matt Heist leads the teams responsible for Financial Planning & Analysis and Go-to-Market Strategy & Operations at Slack Technologies. Prior to Slack, Matt led High Gear Media (HGM), a consumer internet content company, which was acquired by Internet Brands. Before HGM, he spent 6+ years at Yahoo! Earlier in his career he worked as a research analyst at Donaldson, Lufkin & Jenrette and Bear Stearns. Matt started his career as an attorney in the law firm of Cacace, Tusch & Santagata, focusing on commercial litigation. Matt graduated from the College of William & Mary with a concentration in Government and a minor in Economics. Matt was a member of William & Mary's Varsity Swimming and Diving team. Matt also earned a Juris Doctor from George Washington University, in Washington, DC and an MBA from the University of Southern California's Marshall School of Business. Matt is a member of the New York and Connecticut Bar Associations and is a Chartered Financial Analyst. Matt met his wife, Adrienne, at William & Mary. They continue to support the University, including endowing a scholarship for out-of-state students interested in attending the College. Adrienne & Matt have 3 children, one of whom will be attending William & Mary starting in the Fall of 2020. They live in the San Francisco Bay area.

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PANELISTS

ANN MARIE HIGGINS '06

PARTNER
ERNST & YOUNG (EY)

Ann Marie is a partner in the Financial Accounting Advisory Services practice of EY. She has over 16 years of industry experience providing services to a variety of clients including multi-banks, broker-dealer organizations, and exchanges. She began her career in New York City, spent two years in Zurich, Switzerland as part of EY's global exchange program, and is currently based in the Atlanta office. Ann Marie specializes in advising companies on their capital market transactions from IPOs, divestitures and mergers and acquisitions. She loves helping companies on their path to going public and navigating through the challenges of being a public company. Away from work, Ann Marie is happily married to a fellow William and Mary alumni (class of '05) and a mom to two sweet little boys. She is a passionate world traveler, avid book reader, and enjoys spending time with family and friends.

AARON HURWITZ '08

PRINCIPAL
THE CARLYLE GROUP

Aaron Hurwitz is a Principal at The Carlyle Group, focused on investments in the aerospace, defense and government services sectors within U.S. Buyout. He is based in Washington, DC. Since joining Carlyle, Mr. Hurwitz has been involved with Carlyle's investments in StandardAero, Titan, PrimeFlight Aviation, Loc Performance, and IMIA. Prior to joining Carlyle, Mr. Hurwitz worked in private equity at CCMP Capital and Veritas Capital, where he evaluated and executed investments across a broad range of industrial, health care, and A&D sub sectors. Prior to that, Mr. Hurwitz worked in investment banking in the industrials and transportation group at Deutsche Bank. Mr. Hurwitz received an MBA with honors from The Wharton School at the University of Pennsylvania and a BBA with honors from the College of William and Mary.

LAUREN JACOBSON '07

CHIEF INVESTMENT OFFICER
HAMILTON COLLEGE

Lauren Jacobson is the Chief Investment Officer of Hamilton College's $1.3bn endowment. In this role she oversees the investment team, asset allocation and manager selection. Prior to joining Hamilton in 2022, Lauren was a Managing Director at Columbia Investment Management Company (Columbia University's $13bn Endowment). She was co-head of Columbia's $8bn marketables asset classes and a member of the Portfolio Construction Committee after spending several years as a generalist investing across private and public asset classes. Prior to joining Columbia in 2017, Lauren spent eight years at the Rockefeller Foundation's $5 billion endowment where she was a Director and member of a three-person team focused on marketable assets. Her primary focus was managing Rockefeller's $1 billion hedge fund portfolio. Lauren began her career at Goldman Sachs as an Analyst on the convertible bond desk. Lauren graduated from the College of William and Mary in 2007 with a B.B.A. in Finance and was a member of the varsity track team. Lauren resides in Rumson, New Jersey with her husband, Matt, and three children, Michaela, Emma and Jack.

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PANELISTS

KLAUDIA KASZTELANIEC '09
ASSOCIATE PARTNER
MCKINSEY & COMPANY

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

YAEL KAUFMANN '11
CO-FOUNDER & COO
LEARN IN (ACQ. BY DEGREED)

Yael (Gilboa) Kaufmann is Co-founder & COO of Learn In, and SVP Finance & Operations at Degreed. She is an investor turned operator and lifelong learner who believes that learning neither begins nor ends with a degree. Yael began her career as an investor in private equity, and was an impact investor, venture capitalist, and fintech entrepreneur prior to co-founding Learn In. Learn In has been recognized as a leader in education technology by several industry publications, a Best Workplace by Inc. Magazine, and has been covered in CNBC, USA Today, and Techcrunch, among others. Learn In was recently acquired by Degreed, and both have been backed by leading edtech & future-of-work investors. Yael earned her MBA from Harvard Business School, her BS in Mathematics and Finance from the College of William & Mary, and her passion for education from a decade of teaching and tutoring.

ALEX KOCHER '12
DIRECTOR, CLIENT STRATEGY
GLOBAL ENDOWMENT MANAGEMENT

Alex Kocher is a Director on the Client Strategy Team at Global Endowment Management (GEM), a a leading outsourced Chief Investment Office (OCIO) stewarding the assets of endowments, foundations, and other long-term investors. In his role, Alex leads all aspects of client engagements, supporting investment policy development, portfolio implementation and oversight, and partnering with client committees and staff. Previously, he held roles on the Public Investments team covering public equity and hedge fund investments. Prior to joining GEM in 2014, Alex was an Investment Banking Analyst in Jefferies' Consumer and Retail group. Alex graduated from The College of William & Mary with a B.B.A in Finance and a double major in International Relations. He is a CFA Charterholder.

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FRANCIS LYONS '93

CEO

OOPOLL, INC.

Founder and CEO of ooPoll, a social media platform whose mission is to disrupt the attention and build a better media ecosystem. A longtime producer at MTV, Vice, and ESPN, and a patent holder of Truepic, a world leader in digital verification technology, Francis has a passion for mental health, media ethics and literacy, and increasing the role of young people in corporate and civic leadership.

ED MCGANN '82

MANAGING DIRECTOR, MARKETS

BNY MELLON

Ed is the global head of FX Platform Sales and member of FX executive management team. He is responsible for business development for the Custody FX; FX Overlay; and FX Payments products delivered through BNY Mellon's Markets business. Ed is also the strategic FX executive liaison to the internal business lines for business development and client management. Ed has 40 years of experience in the banking and securities services industry. Prior to his current role in BNY Mellon's Markets business, Ed was the Head of Product Management for Global Financial Institutions and International Markets in BNY Mellon's Asset Servicing business. Prior to that Ed served as the head of The Bank of New York's U.S. Financial Institutions Relationship Management Division. Before joining The Bank of New York, Ed worked at Chase Manhattan Bank in Global Investor Services and at U.S. Trust Company of New York in Investment Services. Ed received a B.A. in Economics from The College of William and Mary and an M.B.A. in Finance from New York University.

NANDHINI NALLAMOTU '23

INVESTMENT BANKING ANALYST

RBC CAPITAL MARKETS

Nandhini Nallamotu is an Investment Banking Analyst at RBC Capital Markets within the Global Private Capital Group. Nandhini graduated Phi Beta Kappa with a B.A. in Global Studies with a double major in Finance, was involved in the Finance Academy as a Vice President, and served as a Teaching Assistant within the Finance Department at William & Mary.

VITORIA OKUYAMA '21

INVESTMENT BANKING ANALYST

CITI

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PANELISTS

GREG PIERONI
MANAGING DIRECTOR
UBS

Greg joined UBS Private Wealth Management in 2009 and has more than 25 years of private wealth management experience. Previously, he worked for 15 years at Goldman Sachs after spending five years with Conoco as an oil trader implementing risk management strategies. Greg and his team oversee and manage approximately $4.5 billion in assets for ultra-high net worth individuals and families. Greg is also the lead portfolio manager for the team's proprietary $500 million Master Limited Partnership portfolio strategy. He received his B.S. from Louisiana State University and his M.B.A. from Harvard Business School.

MOLLY PIERONI '90
PRESIDENT AND PARTNER
YACKTMAN ASSET MANAGEMENT

Ms. Pieroni is Partner and President at Yacktman Asset Management. Prior to Yacktman, Molly founded MC2 Institute, an executive advisory firm serving major technology, industrial, financial services and business services companies. Prior to MC2, she served on the leadership team of Highside Capital, a $5B global equity long short hedge fund based in Dallas and New York. Earlier in her career, Molly was a co-founder of JatoTech Ventures, an early-stage technology venture capital firm. JatoTech's portfolio companies were acquired by Broadcom, Silicon Labs, Intel and Qualcomm. Prior to JatoTech, Molly was a Principal at Boston Consulting Group, and she was part of the initial team that established the Dallas office for the firm. Molly began her career as an investment banking analyst in New York. Molly holds a BBA from William and Mary and an MBA from Harvard.

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PANELISTS

ABBEY REECE '16

BUSINESS OPERATIONS MANAGER
GREATHOUSE REMODELING

Abbey Reece 16' is a former consultant turned entrepreneur with a passion for small businesses. After graduating from William & Mary with a Finance major and Psychology minor, Abbey began her career as a consultant with Bain & Company in the Atlanta office. The strategic experience and mentorship proved invaluable, but Abbey was eager to gain exposure to entrepreneurship, an area of interest for her. She pursued an MBA with a focus in entrepreneurship from Kellogg School of Management, during which time she interned with numerous startups across all stages of funding. After graduating, in the midst of COVID and still not sure exactly where she fit into the entrepreneur world, Abbey joined her family construction business where she found a unique blend of passions as a leader of a small remodeling company with immense potential for growth. After getting married and taking a year off work to go backpacking in New Zealand, Abbey is now a part of the leadership team at GreatHouse Remodeling in her home city of Atlanta, GA, and finds immense joy in not only helping the company and its employees grow and thrive, but also in her company's ability to transform peoples' lives through their homes. Abbey loves to stay busy and is always looking for opportunities to continue to help small businesses and their leaders achieve their growth potential. In her free time, you can usually find her in the US National Parks hiking with her husband (they're hoping to visit all of them someday!) and staying involved with her church and its ministry work.

TREVOR REECE

FINANCIAL PLANNER
RONALD BLUE TRUST (FORMERLY MCKINSEY & COMPANY)

Trevor is a financial planner at Ronald Blue Trust, based in Atlanta, GA. Prior to joining Ronald Blue, he worked at McKinsey & Company for nine years where he focused on clients in the banking and payments sector. Trevor led teams comprised of consultants, data engineers, and software engineers on projects involving go-to-market strategy development, business unit transformation, analytical benchmarking using big data, and sales prospecting optimization using machine learning. Trevor has a BBA in Finance and a B.S. in Mathematics from the University of Georgia where he graduated summa cum laude in 2012. Trevor enjoys backpacking, visiting National Parks, and golfing with his wife.

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PANELISTS

PHILIP ROANE '06

Philip Roane has held roles in corporate development, corporate finance, private equity and investment banking. He received a BA from the College of William & Mary and an MBA from Harvard Business School.

CHRIS ROBINSON '05

MANAGING DIRECTOR
DELOITTE & TOUCHE LLP

Chris Robinson leads financial reporting and sustainability, assurance and advisory services projects at Deloitte. Having worked in over 40 countries, Chris has developed an expertise at the confluence of finance and international development, working with clients like the World Bank, International Monetary Fund, and Inter-American Development Bank. He currently works in Washington, DC, and previously lived and worked in Southeast Asia and Southeast Europe, where he helps clients develop and achieve net-zero targets and report to stakeholders in accordance with international sustainability and financial reporting standards.

RUSSELL SCHMIDT '07

MANAGING DIRECTOR
MORGAN STANLEY

Russell is a Managing Director at Morgan Stanley and co-leads the Consumer & Retail Equity Capital Markets practice. Russell has spent 16 years in broader investment banking, primarily in equity capital markets, with additional experience working in Leveraged Finance and Private Placements / PIPEs. Prior to his current role, Russell was a Managing Director at Goldman Sachs, where he led the Industrials and Business Services Equity Capital Markets verticals. During his career in equity capital markets, Russell has worked on over 260 bookrun transactions, raising $105bn in proceeds, of which over 170 deals were lead-left / active bookrunner roles. Russell graduated magna cum laude from The College of William & Mary with a double major in History and Finance. He holds an MBA from Columbia Business School and is a Chartered Financial Analyst (CFA).

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PANELISTS

RYAN SELLS '07

CO-FOUNDER & GENERAL PARTNER
DASH FUND

Ryan Sells is a Co-Founder & GP at Dash Fund, an early-stage FinTech-focused venture capital fund. He is also the Head of Data Strategy within Bloomberg's Alternative Data business. Prior to these roles, Ryan served as the Head of BD at Second Measure, an alternative data startup (YC S15, acquired by Bloomberg), and as the Head of Revenue at Pipe, an alternative lending startup. Ryan began his career at JPMorgan and graduated from William & Mary in '07 with a double major in Finance & History, while also playing for the men's varsity soccer team.

GREGORY SHENKMAN '03

VICE PRESIDENT, TRADER, BANK LOANS
SHENKMAN CAPITAL

Gregory Shenkman joined Shenkman Capital in 2003. He has over 20 years of leverage finance experience. During his first two years at Shenkman Capital, he was a Research Associate. He traded high yield bonds for 7 years before joining the loan team in 2012. Mr. Shenkman received his BBA from the College of William & Mary (2003). In addition, he 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, and is currently on the Board of Directors of W&M Hillel. Mr. Shenkman is also on the Executive Committee of the Alumni Development Council for Brunswick School in Greenwich, CT. He currently lives in Greenwich, CT with his wife Rebecca, their twins, Wellesley and Grant, and their youngest daughter, Amelia.

CHARLEY SHERMAN '20

SENIOR BUSINESS ANALYST
MCKINSEY & COMPANY

Charley Sherman is a senior business analyst in McKinsey & Company's digital practice at. In this role, he is responsible for advising financial services, healthcare, and B2B technology clients on growth strategy, new business building, consumer experience, and tech modernizations. Prior to McKinsey, Charley began his career as a management consultant within Booz Allen Hamilton's organizational transformation & change practice, where he supported program offices within the Department of Defense on strategic planning, human capital, and digital transformation topics. Charley earned a BBA in finance from William & Mary, graduating summa cum laude.

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JACK SPENCER '21

CONSULTANT
WEST MONROE PARTNERS

Jack is a consultant at West Monroe Partners in the Financial Services practice based in New York. He focuses on digital strategy and merger integrations, helping banks develop a roadmap to modernize technology and assess opportunities for post-merger synergies. Jack graduated from William and Mary in 2021 with a major in Finance.

ERWIN VAN DER VOORT

GROUP HEAD, MANAGING DIRECTOR OF GLOBAL PRIVATE CAPITAL GROUP
RBC CAPITAL MARKETS, LLC

Erwin van der Voort is a Managing Director and the Head of the Global Private Capital Group, at RBC Capital Markets based in New York. He is responsible for all private capital transactions at RBC including coverage of investment holding companies, alternative asset managers, family offices and hedge fund clients, the marketing, structuring, execution and placement of Private Capital transactions and Special Purpose Acquisition Corporations (SPACs). Prior to joining RBC in October 2016, Erwin was with Credit Suisse, most recently leading the Hedge Fund Investment Banking business, which he founded in 2011. From 1996 until 2010, Erwin was a member of the Mergers & Acquisitions group, responsible for marketing and executing M&A and strategic advisory assignments. From 2007 until 2010, Erwin led CS's M&A business in Continental Europe, Middle East and Africa based in London. Prior to moving to London, Erwin was a member of CS's M&A group in New York from 1998 to 2007, responsible for the M&A product in the Consumer Products and the Lodging & Leisure sectors. Erwin joined Credit Suisse in 1994 in Equity Capital Markets. During this period he was involved in initial public offerings and secondary equity offerings in a variety of different industries. Erwin earned a dual Master's degree in Economics from Erasmus University Rotterdam, the Netherlands.

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JARRETT WALKER '13

INVESTMENT BANKING VICE PRESIDENT
J.P. MORGAN

Mr. Walker is a Vice President in J.P. Morgan's Corporate and Investment Bank, delivering client coverage and transaction execution to a diverse set of large cap and middle market corporate clients. He has significant M&A advisory experience along with prominent capital markets experience across and a range of debt and equity instruments. Mr. Walker holds a Master of Business Administration with a concentration in finance, from the University of Virginia Darden School of Business in Charlottesville, Virginia and a Bachelor of Arts in Economics from The College of William and Mary.

CHRIS WILLIAMS '06

MANAGING DIRECTOR
MOTIVE PARTNERS

Chris Williams joined Motive Partners in 2022 and is a Managing Director on the Investment Team based in New York. At Motive, Chris focuses on investment thesis development, deal origination and execution, and the management of Motive's portfolio companies. Prior to joining Motive, Chris was a Principal at Oak Hill Capital Partners, where he focused on investments across financial, business, and consumer services sectors. This role saw Chris manage investments totaling over $1.5 billion in equity. During his 14-year tenure, Chris held leadership roles in relation to the recruitment and career development of Oak Hill's Investment Team and served on multiple firmwide committees (including the valuation committee) and as a Board member of various Oak Hill investments. Prior to Oak Hill, Chris was an Analyst at the Americas Financial Institutions Bank Group within Goldman Sachs' Investment Banking Division, where he focused on M&A advisory and capital raising for clients across all sectors of financial services. Chris earned a B.S.in Business Administration from the College of William & Mary and is a James Monroe Scholar.

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