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FROM DOG STREET TO WALL STREET

Finance Career Exploration Conference

PANELISTS

Investment & Corporate Banking

Patrick Bisceglia '09

Managing Director
BDO Capital Advisors

Patrick Bisceglia is a Managing Director at BDO Capital Advisors, LLC, a leading middle market investment bank, FINRA/SIPC member firm and affiliated company of BDO USA, P.C., a Virginia professional corporation. He serves as Global Co-Head of Technology, Media & Telecom (TMT) investment banking for BDO, an international network of public accounting, tax and advisory firms that spans more than 160 countries and territories with 115,000+ people working out of more than 1,700 offices. Patrick has over 15 years of experience advising middle market companies across a broad spectrum of corporate finance matters, including mergers and acquisitions, leveraged buyouts, recapitalizations, and debt and equity financings. After a decade in the firm's Boston office, Patrick led the expansion of BDO Capital to Richmond, VA where he is focused on managing BDO Capital's relationships and clientele throughout the Atlantic and Southeast regions. Patrick graduated with Honors from the Mason School of Business at the College of William & Mary with a BBA in Finance and a minor in Economics.

Brandon Bleakley '12

Director
Houlihan Lokey

Brandon Bleakley is a Director in Houlihan Lokey's Business Services Group, covering pharma services and commercialization. He performs sellside and buyside M&A advisory engagements. Brandon is based in the firm's New York office. Prior to joining Houlihan Lokey, Brandon worked at Mizuho Securities, providing cross-border M&A advisory in the oil & gas and power & utilities sectors. Before that, he worked in the Transaction Advisory Services group at EY, providing valuation and business modeling services. Brandon earned an undergraduate degree in Applied Mathematics, with a second major in Finance, from the College of William & Mary.

Garrett Curtiss '21

Associate, Corporate Banking
RBC Capital Markets

Lani Davidoff '20

Project Finance Associate
MUFG

Lani is an associate on the Project Finance team within the Global Corporate and Investment Banking division of MUFG Bank, Ltd. Lani has over three years of experience originating debt financing across renewable energy, natural resources, and infrastructure transactions. She engages with clients, lender groups, external counsel, and specialized technical consultants to deliver tailored financial solutions and conduct comprehensive due diligence for significant projects across the Americas. Lani earned a BBA in finance from William & Mary, graduating summa cum laude.

Michaela Diverio '07

Managing Director
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.

Will Glass '07

Partner
Perella Weinberg Partners

Will Glass, class of '07, is a Partner in Perella Weinberg Partners' advisory business. He advises clients in the Healthcare sector, specializing in MedTech. Will has spent nearly his entire career in investment banking beginning as an analyst, with a brief interlude in corporate development. Early in his career, Will worked across industries, including Healthcare, Consumer, Technology, Media, Telecom, Financial Institutions, Energy, and Natural Resources, and products including M&A, Restructuring, Private Capital, and Activism Defense. Today, Will focuses primarily on MedTech but also advises on complex situations across industries and sits on the Perella Weinberg Partners Fairness Committee.

Phil Loria '17

Vice President
Clearsight Advisors

Phil's is a Vice President at Clearsight Advisors, a boutique investment bank focused on sell-side M&A for high-end consulting and professional services businesses. He has advised dozens of companies in the technology services sector, with a focus on enterprise software development, data analytics & AI, and cloud computing, and brings experience in other high-end professional services verticals, such as strategy & management consulting and private equity services. He started his career as an Investment Banking Analyst at B. Riley FBR, and earned a BBA in finance and economics from William & Mary.

Pat Martin '87 '98

Managing Director
Fifth Third Securities

Pat is a Managing Director in the Corporate Finance Group at Fifth Third Securities, an investment banking team focused on providing strategic advice to middle market companies regarding growth, capital structure, and shareholder liquidity. He has more than two decades of investment banking experience advising clients on a broad range of mergers & acquisitions and strategic advisory assignments including divestitures, capital raisings and financings. Prior to joining Fifth Third he spent twenty-four years with BB&T Capital Markets (nka Truist Securities) where he was most recently a Managing Director. During his time with BB&T/Truist he advised public and private companies across a variety of industries in mergers & acquisitions, debt and equity transactions. He also led the firm's Strategic Advisory practice which he helped create to serve the needs of founder and family-owned businesses. Pat earned a B.B.A. in Accounting and MBA from William & Mary. He is also a CFA Institute charterholder.

Max Moore '23

Analyst

Raymond James

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Russell Schmidt '07

Managing Director

Morgan Stanley

Russell is a Managing Director at Morgan Stanley and is head of the Alternative Capital Solutions practice for the firm. Russell has spent 17 years in broader investment banking, primarily in global capital markets with roles in Equity Capital Markets, Leveraged Finance and Alternative Capital Solutions throughout his career; most recently Russell served as Co-head of Morgan Stanley's Consumer & Retail Equity Capital Markets business. Prior to joining Morgan Stanley in 2022, Russell was a Managing Director at Goldman Sachs, where he led the Industrials and Business Services Equity Capital Markets verticals. 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)

Mark Smith '22

Analyst

Perella Weinberg Partners

Mark is an analyst at Perella Weinberg Partners where he has worked in the healthcare and shareholder activism groups since 2022. Prior to joining PWP, Mark completed internships at Raymond James and Goldman Sachs. Mark graduated William & Mary Phi Beta Kappa with majors in Finance and Religious studies.

Erwin van der Voort

Vice Chairman

RBC Capital Markets

Erwin van der Voort is a Vice Chairman at RBC and heads the Global Private Capital Group, 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.

Jarrett Walker '13

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.