



18TH ANNUAL  
**FROM DOG STREET  
TO  
WALL STREET**



Celebrating 10 Years of The Boehly Center for Excellence in Finance &  
20 Years of The Howard J. Busbee Finance Academy



Raymond A. Mason  
School of Business  
WILLIAM & MARY

THE  
BOEHLY CENTER  
FOR EXCELLENCE IN FINANCE

HOWARD J. BUSBEE  
FINANCE ACADEMY



WILLIAM  
& MARY  
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OFFICE OF CAREER DEVELOPMENT  
& PROFESSIONAL ENGAGEMENT



The 18th Annual From DoG Street to Wall Street event, co-sponsored by the Boehly Center for Excellence in Finance at the Mason School of Business, the Howard J. Busbee Finance Academy, and the Office of Career Development & Professional Engagement in the Cohen Career Center, was held in-person from September 5 in Phi Beta Kappa to September 6, 2024 in Miller Hall.

To kick off the event, students enjoyed a spectacular keynote address by Dan Draper '91. The program continued with a series of networking sessions and panels on a broad variety of topics from W&M alumni and guests within the industry, including early career success, private equity & alternative investments, investments & corporate banking, hedge funds, consulting, and more. Students of all majors and academic years explored the wide variety of opportunities in finance.





- 4**     **EVENT OVERVIEW DAY 1 & DAY 2**  
Take a look at our incredible panels and speakers
- 8**     **2024 HOWARD J. BUSBEE FINANCE ACADEMY AWARD**  
Learn more about Alice Davison
- 10**    **KEYNOTE ADDRESS**  
Dan Draper '91, Chief Executive Officer at S&P Dow Jones Indices
- 12**    **MEET THE PANELISTS**  
Read up on our outstanding alumni
- 52**    **THE BARZACH-RODAY TRIBE SANDWICH**  
Honoring Dan Barzach and Harrison Roday with a turkey and pastrami sandwich with coleslaw and Russian dressing on seedless rye
- 53**    **MEET THE FINANCE ACADEMY**  
Meet the accomplished students who bring this event to life
- 53**    **SPECIAL THANKS: BOEHLY CLUBS & THE BOEHLY BOARD**  
Learn about the students & professionals whose support makes Boehly initiatives possible
- 59**    **PHOTOS**  
Photos from the Day 1 and Day 2 of the event



Time	Event/Details	Location
<b>4:00pm</b> Thurs. Sept. 5	<b>Early Career Success Panel</b> Jessica Burt '02, Alice Davison P'16, Scott Gehsmann '84, Jon Lamb '07 Targeting students with past work experience, this panel will discuss how students can set themselves apart early in their careers.	<b>Studio Theatre</b> Phi Beta Kappa Memorial Hall
	<b>Finance 101 Panel</b> Craig Armstrong '92, John Curtiss '93, Mark Decker '97, Matthew Fiordaliso '04, Julia Frost '17, Nic Greer '16, Ann Marie Higgins '06, Kevin Tunick '77 Designed for students wanting to learn the basics about different finance careers, this panel will expose students to several different career options.	<b>Glenn Close Theatre</b> Phi Beta Kappa Memorial Hall
<b>5:00pm</b> Thurs. Sept. 5	<b>Keynote Address</b> Dan Draper '91 CEO at S&P Dow Jones Indices	<b>Glenn Close Theatre</b> Phi Beta Kappa Memorial Hall
<b>8:00am</b> Fri. Sept. 6	<b>Check in, Coffee, Networking</b>	<b>Atrium</b> Miller Hall
<b>9:00am</b> Fri. Sept. 6	<b>Asset, Wealth, &amp; Portfolio Management Panel</b> Lauren Finikiotis '21, Alex Kocher '12, David Seidl '23, Tovia Rosner '19 Learn about asset management including managing money for high-net worth individuals and endowments.	<b>1088</b> Miller Hall
	<b>Sales &amp; Trading Panel</b> John Leone '91, Miguel Abradu-Otoo '23, Ryan Sells '07, Greg Shenkman '03 Are you great with numbers? In this panel you will learn about working in a fast-paced sales and trading finance career.	<b>1082</b> Miller Hall
	<b>Private Equity &amp; Alternative Investments Panel</b> Ryan Bolowsky '16, Matt Clark '12, Manny Enriquez-Hesles '18, Nic Greer '16, Aaron Hurwitz '08, Gabby Lewis '20, Tiffany Theriault '10, Brandon Wolfe '07 What do people do who work in private equity? Attend this panel to learn more.	<b>Brinkley Commons</b> Miller Hall
<b>10:00am</b> Fri. Sept. 6	<b>Research Panel</b> Lynsey Prout '20, Will Rosenbaum '19, Josh Siegler '16, Andrew Weeks '14 Dive into the world of financial research and discover how analysts predict market trends and inform investment decisions.	<b>1078</b> Miller Hall
	<b>Hedge Fund Panel</b> Dan Barzach '13, Austin Camporin '04, Matthew Siano '96 Curious about hedge funds? Join this panel to explore the strategies and careers within the hedge fund industry.	<b>1088</b> Miller Hall
	<b>Public &amp; Non Profit Finance Panel</b> Peter Ginsberg, Megan McCamey '91, John Kandrac '03, Daniel Owens '05 Learn about the unique challenges and rewarding careers in public and non-profit finance, where making a difference meets financial expertise.	<b>1082</b> Miller Hall



Time	Event/Details	Location
<b>11:00am</b> Fri. Sept. 6	<b>Investment &amp; Corporate Banking Panel</b> Patrick Biscaglia '09, Brandon Bleakley '12, Garrett Curtiss '21, Lani Davidoff '20, Michaela Diverio '07, Will Glass '07, Pat Martin '87 '98, Russell Schmidt '07, Mark Smith '22, Erwin van der Voort, Jarrett Walker '13 Uncover the roles and opportunities in investment and corporate banking, where major financial deals are made.	<b>Brinkley Commons</b> Miller Hall
<b>12:00pm</b> Fri. Sept. 6	<b>Howard J. Busbee Finance Academy Networking Luncheon</b>	<b>Various</b> Miller Hall
<b>1:00pm</b> Fri. Sept. 6	<b>Consulting Panel</b> Sharon Bernacki '08, Liam Cashel '18, Katherine Covino '12, Scott Gehsmann '84, Ann Marie Higgins '06, Klaudyna Kasztelaniec '09, Lauren Kroepfl '21, Andrew Luchs '22, Chris Maher '79, Taylor Robertson '23, David Welch '97 Learn how consultants solve complex business problems and drive strategic growth for clients across various industries.	<b>Brinkley Commons</b> Miller Hall
<b>2:00pm</b> Fri. Sept. 6	<b>Quantitative Finance Panel</b> Richie Bellucci '20, Jessica Burt '02, John Leone '91  Passionate about math and algorithms? This panel will introduce you to the exciting field of quantitative finance and its cutting-edge applications.  <b>Corporate Finance Panel</b> Melissa Ballenger '92, Bill McCamey '91, Hull McKinnon '95  Interested in managing a company's finances? Attend this panel to explore careers in corporate finance and the strategies behind business growth and stability.  <b>Venture Capital, Startups, &amp; Social Entrepreneurship Panel</b> Spencer Kushner '13, Francis Lyons '93, Megan McCamey '91, Ryan Sells '07  Discover how venture capital fuels startups and drives social change.	<b>1078</b> Miller Hall   <b>1082</b> Miller Hall   <b>1088</b> Miller Hall
<b>3:00pm</b> Fri. Sept. 6.	<b>Closing Remarks</b>	<b>Atrium</b> Miller Hall













# Alice Davison

Retired, Former Senior Vice President Capital Group



In the words of Stacy Summerfield, daughter of Howard J. Busbee, "this award, now in its 20th year, was created to recognize those who embody [Howard's] mission to serve others, often behind the scenes and without seeking accolades, and those who find joy when the people around them thrive."

The Howard J. Busbee Finance Academy Alumni Award is presented on behalf of the members of the Finance Academy to graduates of The College of William & Mary who have distinguished themselves in their careers in finance. Recipients are recognized for their selfless contribution of their valuable time and for their dedication to helping the current student body deepen their understanding of finance and discover their career interests.

This year, the Finance Academy was proud to present the award to Alice Davison, recognizing her as "...a tremendous source of energy and inspiration, not only for her professional achievements but also for her unwavering commitment to enhancing the student experience." From mentoring and traveling with teams in national stock competitions to spearheading initiatives that support women in finance, Alice's impact has been felt far and wide.

**Congratulations Alice, and Thank You!**







## Dan Draper '91

Chief Executive Officer at S&P Dow Jones Indices



Dan Draper is Chief Executive Officer at S&P Dow Jones Indices (S&P DJI), responsible for all aspects of the index business globally. S&P DJI is the world's leading index provider and offers investment professionals around the world an array of products from core indices such as the S&P 500® to broad comprehensive benchmarks.

Before joining S&P DJI, Mr. Draper held asset management, wealth management, and investment banking leadership positions in New York, London, Hong Kong, Jakarta with Invesco, Credit Suisse Asset Management, Lyxor Asset Management, iShares/Barclays Global Investors, Goldman Sachs, UBS Wealth Management, and Salomon Brothers.

Mr. Draper earned an MBA from the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill and a Bachelor of Arts in economics from the College of William and Mary in Virginia. He is a Chartered Financial Analyst® (CFA) charterholder and holds the Chartered Market Technician®, Chartered Alternative Investment Analyst, Financial Risk Manager, Certified Financial Planner®, and Chartered Financial Consultant® designations.

Mr. Draper is a Board Director and former Chairperson for the Index Industry Association and Trustee of the Committee for Economic Development (CED) of The Conference Board. He is a chartered director and fellow at the Institute of Directors in the UK and a board leadership fellow at the National Association of Corporate Directors in the U.S. In addition, he is a fellow of the 2017 class of the Aspen Institute Finance Leaders Fellowship and a member of the Aspen Global Leadership Network. Mr. Draper serves as a board director for the Lyric Opera of Chicago and Delta Dental of Virginia.





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## Early Career Success



### Alice Davison P'16

Retired, Senior Vice President  
Capital Group

Alice Davison spent over three decades at one of the world's premier investment companies, Capital Group, whose mission is to improve people's lives through successful investing. Alice built, grew and led a global talent function responsible for recruiting and assessing exceptional analysts and investors. As a senior leader, she demonstrated an unwavering commitment to cultivating human potential, forging high-performing teams, shaping the organizational culture, and delivering outstanding business results. Her most recent title was Senior Vice President, Head of Capital Associates Program & Early Investor Development. She previously served as Vice President of Global Investment Group Talent Acquisition. With a strategic focus on identifying talent and developing people, Alice led the creation and implementation of recruiting, development, and diversity programs that have left lasting marks on a 92-year-old firm now managing more than \$2.5 trillion. She earned her bachelor's degree in economics from Bowdoin College and an MBA with distinction from New York University's Leonard N. Stern School of Business. She is a Trustee of Far Brook School in Short Hills, New Jersey, and a Trustee of the William & Mary Business School Foundation in Williamsburg, Virginia. She is a founder of the Women's Stock Pitch at William & Mary. Alice recently completed 12 years of Board service at the Forte Foundation. Alice and Howard (Tomb) live in Summit, New Jersey. Their blended family includes three well-behaved adult children and two naughty French Bulldogs.





## Scott Gehsmann '84

Retired Partner

Transaction Services PwC

Scott served as a Transaction Services Capital Markets partner for over 25 years, dedicated to providing advisory services related to the accounting, financial reporting, and regulatory aspects of capital market transactions. He advised on over one hundred IPOs and has extensive experience with debt offerings, carveouts, spin-offs, acquisitions and other transaction related matters. Scott has worked with companies in a variety of industry sectors and has extensive experience working with private equity, having led the PwC Private Equity Sector National Assurance Program. Scott spent ten years with PwC living and working overseas and served two terms on the PwC Board of Partners. A Certified Public Accountant, Scott is a member of the American Institute of Certified Public Accountants and the New York and New Jersey State Societies of Certified Public Accountants. Scott received his MBA from Manchester University in England. He speaks Swedish and Norwegian. Scott and his wife Maiken live in Morristown, NJ, and have four children. Scott's children Fredrik ('18) and Maiken ('26) attended the College, a Finance and Accounting major, respectively. Scott's sisters, Kori ('91) and Karleen ('93), also attended W&M. Scott and his family make it a point to attend the W&M events they are invited to.



## Jon Lamb '07

Managing Partner

Orion Resource Partners

Jon Lamb is a Managing Partner, leading the investment team for Orion's royalty funds and a senior member of the investment team for Orion's mine finance funds. Mr. Lamb currently serves on the board of directors of Sweetwater Royalties (Chairman) and Rigel Resource Acquisition Corp and has previously served on the boards of Atalaya Mining plc and Lynx Resources Ltd. Prior to Orion, Mr. Lamb worked at Deutsche Bank in their Metals & Mining investment banking group primarily focused on financing solutions and M&A across the base metals, precious metals, coal and steel sectors. He graduated from the College of William & Mary, majoring in Finance and Government and currently serves on the Advisory Board of the Boehly Center for Excellence in Finance at the Mason School of Business. Mr. Lamb resides in Bedford, NY with his wife, Hanna, and their three daughters.



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## Jessica Burt '02

Managing Director  
BlackRock

Jessica K Burt, Managing Director, is head of BlackRock's client platform tech enablement strategy within the global client businesses. Prior, Ms. Burt led the global platform and business strategy for BlackRock Investment Stewardship (BIS), overseeing daily operations and strategic initiatives for BIS. Ms. Burt also headed the Voting Platform known as 'Voting Choice', 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 (now BTO) 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.







# Finance 101



## Craig Armstrong '92

Senior Portfolio Manager  
Insight Investment

Craig joined Insight's Fixed Income Group in January 2015 following BNY Mellon's acquisition of Cutwater Asset Management (Cutwater). Craig is a senior portfolio manager with a primary focus of managing multi-sector investment portfolios and developing strategies for insurance clients. Previously Craig specialized in the modelling, analysis, and management of asset backed and mortgage-backed securities. He has also held positions in market risk where he was responsible for quantitative analysis, risk management and control functions and in the LDI business segment where he worked in the risk analytics and treasury functions. He began his financial services career at Cutwater in 1992. Craig holds a BBA degree from the College of William and Mary in Williamsburg, VA and an MBA from the Stern School of Business at New York University. As well as being a member of the New York Society of Security Analysts, Craig holds Series 7 and 63 licenses from the Financial Industry Regulatory Authority (FINRA) and is a CFA charterholder.







## John Curtiss '93

### National Product Development Leader Progressive Insurance

John is the National Product Development Leader in Personal Lines at Progressive Insurance. In this role, he is responsible for leading the product design, pricing, telematics and catastrophe modeling teams for their private passenger auto and property products. He also manages Progressive's Recreational Lines division. Prior to Progressive, he worked as Risk Analyst for JPMorgan, an investment banking analyst for Salomon Brothers in NYC and Hong Kong and a Business Manager for Capital One. John has an undergraduate degree in Finance and an MBA from Harvard Business School. John resides in Chagrin Falls, OH and is married with three children. Outside of work, he enjoys adventure travel, golfing, scuba diving and cooking.



## Mark Decker '97

### Founding Partner Proterra Real Estate Partners

With over 25 years of real estate and capital markets experience, Mark joined Proterra Real Estate Partners, a newly formed partnership to invest in real estate opportunities in 2023. Prior to joining Proterra, Mark served as CEO of Centerspace (NYSE:CSR), a publicly traded apartment owner-operator with over 13,000 homes in the Mid-West and Mountain West. During Mark's tenure, he led a significant repositioning of the company from a diversified real estate company to a focused owner-operator of apartments. This work included reconstituting the executive team, board of directors, balance sheet and portfolio, as well as a renaming of the Company and revamp of the culture. Before Centerspace, Mark was an investment banker serving the needs of real estate owner-operators, real estate services companies, lodging, and private equity. In his last role, Mr. Decker was Group Head for US Real Estate Investment Banking for BMO Capital Markets. During Mr. Decker's banking career he built several successful practices and worked on over 300 capital markets and advisory transactions valued at more than \$93 billion. Mark is a Trustee of Alpine Income Property Trust (NYSE: PINE) as well as Advanced Volumetrics Alliance, a private modular manufacturer, and a member of the Urban Land Institute.





## Julia Frost '17

Head of Finance

Said Differently

Julia Frost is currently the Head of Finance at the marketing services and digital implementation firm, Said Differently, where she leads M&A, accounting, finance, tax, legal, and reporting activities. Prior, Julia was a senior associate at Falfurrias Capital Partners. At Falfurrias, she specialized in the execution of middle-market equity and leveraged buyout transactions across the end markets of marketing, media, industrials, and business services. Julia is returning to Falfurrias at the end of the month as a Vice President. Before Falfurrias, she was an equity research associate at Capital Group, and an asset manager, where she specialized in US small-cap industrials, Canadian banks, and European aerospace and defense. She graduated summa cum laude from the College of William and Mary with a degree in finance and played Division I lacrosse for the Tribe.



## Matthew Fiordaliso '04

Partner

Ai SPARK

At his current role, Matthew leads the product development and is responsible for creating metrics that power various fixed income institutions. Before joining Ai-Spark, he worked for 12 years at S&P Global running their fixed income pricing service. Mr. Fiordaliso graduated from the Mason School of Business with a Master's degree in Accounting and an undergraduate degree in Finance, both from the College of William and Mary.



## Nic Greer '16

Vice President

Ares Management

Mr. Greer is a Vice President in the Ares Credit Group, where he focuses on opportunistic credit investing. Prior to joining Ares in 2018, Mr. Greer was a Financial Analyst at Houlihan Lokey in the Financial Restructuring Group. Mr. Greer holds a BBA in Finance, magna cum laude, from the College of William and Mary.





## Ann Marie Higgins '06

Partner  
EY

Ann Marie Higgins (class of '06) is a Partner in the Financial Accounting Advisory Services practice of Ernst & Young LLP. She has over 17 years of industry experience providing services to a variety of financial services 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 currently works in the Atlanta office. In her various roles at EY, she has coordinated some of the company's largest and most complex global financial services engagements including UBS, Intercontinental Exchange, Inc. (ICE) and the New York Stock Exchange (NYSE) where she helped complete an \$11 billion acquisition. She has extensive knowledge in business combinations, consolidation, debt refinancing, derivatives, hedging and IPO preparation. Away from work, Ann Marie is happily married to a fellow William and Mary alum (class of '05) with two sweet little boys. She is a passionate world traveler, avid book reader, and enjoys spending time with family and friends.



## Kevin Tunick '77

Vice President & Managing Director, Private Investments  
UNC Management Company Inc

Kevin retired from UNC Management Company ("UNCMC") in January 2023. He spent 15 years at UNCMC as Vice President and Managing Director of Private Investments where he was responsible for managing the more than \$5.2 billion Private Investment portfolio. Prior to joining UNCMC, Kevin spent seventeen years at Harvard Management Company ("HMC") in Boston, MA, where he was Manager, Private Equity and co-managed a \$4.1 billion portfolio of alternative investment partnerships. Prior to HMC, he was also Chief Investment Analyst for The Rockefeller Foundation in New York City, where he managed an \$80 million short-term fixed income portfolio and a \$3 million equity portfolio. Before the Rockefeller Foundation, he was Manager of Partnership Fund Accounting at Commodities Corporation USA in Princeton, NJ, as well as the controller at American Handling Equipment, Inc. Kevin received a B.B.A. from the College of William and Mary in Williamsburg, VA and a M.B.A. from Pennsylvania State University in State College, PA.



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# Asset, Wealth, and Portfolio Management



## Lauren Finikiotis '21

Associate  
J.P. Morgan

Lauren is a Senior Associate at J.P. Morgan Private Bank in Washington, D.C., where she provides comprehensive financial solutions and wealth management services to high-net-worth clients. In this role, Lauren advises entrepreneurs and executives on a range of wealth management issues, including asset allocation, pre-transaction planning, estate planning, balance sheet management, and charitable giving. Prior to this role, Lauren served as an Analyst at J.P. Morgan Private Bank, also in Washington, D.C. Lauren earned a BA in Finance with a minor in Mathematics from William & Mary, graduating summa cum laude. During her time at William & Mary, Lauren was a captain of the cross country and track team.



## Alex Kocher '12

Director  
Global Endowment Management

Alex Kocher is a Director on the Client Portfolio Management team at GEM, a \$12 billion Outsourced CIO founded by the leadership of the Duke University endowment and serving primarily mission-driven nonprofits. In this role, Alex manages client relationships, develops investment policy, and partners with client committees and staff. He previously held roles on GEM's Manager Research team. Prior to joining GEM in 2014, Alex worked in Jefferies' Consumer and Retail investment banking group. Alex received a B.B.A. in Finance with a double major in International Relations from The College of William & Mary. He is a CFA Charterholder.





## Tovia Rosner '19

### Assistant Vice President Allianz Global Investors

Tovia Rosner is a portfolio manager on the Thematic Equity Team at Allianz Global Investors based in London. In this role, she is responsible for helping to manage the Food Security Fund, a fund focused on supporting the achievement of SDG 2 (no Hunger) with investments in sustainable agriculture, supply chain and nutrition. Prior to joining AllianzGI, she worked as a portfolio analyst at Calvert Impact Capital where she helped manage the current portfolio and source deals primarily within the regenerative agriculture space as well as affordable housing. She earned a BBA in Finance from William & Mary, graduating magna cum laude.



## David Seidl '23

### Analyst J.P. Morgan Private Bank

David Seidl is an Analyst at J.P. Morgan Private Bank, currently based in the Washington DC area. A recent graduate of the Raymond A. Mason School of Business at William & Mary, he earned his Bachelor of Business Administration (BBA) in Finance, graduating summa cum laude with a minor in Mathematics and a concentration in Accounting. During his time at William & Mary, David demonstrated strong leadership as the President of the Men's Lacrosse team, spearheading significant fundraising efforts. He has also gained experience through internships in private banking and corporate advising. David is certified with the FINRA Series 7 and Series 66 licenses, reflecting his commitment to a career in wealth management.



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## Consulting



### Clarke Agnew

#### Senior Consultant EY

Clarke is a Senior Consultant in the Business Consulting Finance practice within the Financial Services Organization at EY, based in the Tysons Corner/Washington, D.C. office. Since joining EY in the fall of 2022, he has worked with several banking clients, focusing on regulatory and risk management. He holds a BS in Commerce with a concentration in Finance from the University of Virginia.



### Sharon Bernacki '08

#### Senior Manager EY

Sharon is a Senior Manager in EY's Financial Accounting Advisory Services ("FAAS") practice. Sharon has over 14 years of experience providing technical accounting support in accordance with US GAAP, with a particular focus on capital market transactions. She has assisted with the set-up of Accounting & Financial Reporting functions for newly public companies resulting from complex transactions such as tax-free spin and simultaneous mergers, and mergers with special purpose acquisitions companies. She started her professional services career in 2008 with EY. She completed a rotation with EY's National Professional Practice focusing on consolidation matters, accounting for income taxes, discontinued operations, and fresh start accounting, among other topics. As part of EY's National Profession Practice, Sharon provided interpretative guidance to audit clients and engagement teams. She co-authored EY's thought leadership, including several Financial Reporting Development and Technical Line publications. Sharon holds a B.B.A. in Accounting from The College of William and Mary, and is a CPA. She resides in Cary, NC with her husband and son.







## Katherine Covino '12

### Senior Manager

### Risk & Financial Advisory

Katherine Covino, CPA, is a Senior Manager at a Big Four organization working in its Regulatory & Legal Support group. Over her 12+ years in Big Four Consulting, she has consulted clients on a variety of topics including fraud and investigations, regulatory compliance, financial distress and corporate restructuring, and execution of key performance indicators (KPIs). Ms. Covino evolves in her versatile consulting career by looking for strategic disruptors, the next technology, threat, and white space. Currently, she is a leader in her organization's program integrity practice, driving business development with solutions (including AI and Generative AI) to detect fraud, waste, and abuse and advising clients on regulatory transformation. In addition to driving business development and growth, Ms. Covino also leads a number of teams executing and delivering impactful consulting solutions and projects to clients. Prior to joining the Big Four organization, Ms. Covino earned her B.B.A. from William & Mary in 2012 with an accounting major, finance concentration, and history minor. Ms. Covino lives in Washington, DC with her husband, Martin Feeney ('09), and daughter, Elle.







## Scott Gehsmann '84

Retired Partner

Transaction Services PwC

Scott served as a Transaction Services Capital Markets partner for over 25 years, dedicated to providing advisory services related to the accounting, financial reporting, and regulatory aspects of capital market transactions. He advised on over one hundred IPOs and has extensive experience with debt offerings, carveouts, spin-offs, acquisitions and other transaction related matters. Scott has worked with companies in a variety of industry sectors and has extensive experience working with private equity, having led the PwC Private Equity Sector National Assurance Program. Scott spent ten years with PwC living and working overseas and served two terms on the PwC Board of Partners. A Certified Public Accountant, Scott is a member of the American Institute of Certified Public Accountants and the New York and New Jersey State Societies of Certified Public Accountants. Scott received his MBA from Manchester University in England. He speaks Swedish and Norwegian. Scott and his wife Maiken live in Morristown, NJ, and have four children. Scott's children Fredrik ('18) and Maiken ('26) attended the College, a Finance and Accounting major, respectively. Scott's sisters, Kori ('91) and Karleen ('93), also attended W&M. Scott and his family make it a point to attend the W&M events they are invited to.



## Ann Marie Higgins '06

Partner

EY

Ann Marie Higgins (class of '06) is a Partner in the Financial Accounting Advisory Services practice of Ernst & Young LLP. She has over 17 years of industry experience providing services to a variety of financial services 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 currently works in the Atlanta office. In her various roles at EY, she has coordinated some of the company's largest and most complex global financial services engagements including UBS, Intercontinental Exchange, Inc. (ICE) and the New York Stock Exchange (NYSE) where she helped complete an \$11 billion acquisition. She has extensive knowledge in business combinations, consolidation, debt refinancing, derivatives, hedging and IPO preparation. Away from work, Ann Marie is happily married to a fellow William and Mary alum (class of '05) with two sweet little boys. She is a passionate world traveler, avid book reader, and enjoys spending time with family and friends.



## Klaudyna 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.



## Lauren Kroepfl '21

Structured Finance Senior

EY

Lauren is an associate within Ernst & Young's Structured Finance Advisory Services in New York. She is primarily responsible for securitized product valuation across all asset classes, mainly for clients' most thinly traded positions. Lauren also serves as a structurer for EY's Asset-Backed Securities subgroup. She works with Clients and investment banks to model bond cashflows and perform collateral due diligence on new-issue deals going to market. Lauren earned a BBA in Finance with a minor in economics from William & Mary, graduating magna cum laude. She also competed as a three-season athlete for the Tribe XC and Track & Field programs.



## Andrew Luchs '22

Senior Analyst

Accenture Federal Services

Andrew is a Senior Analyst at Accenture Federal Services based in Washington, DC. In this role he has worked as a dashboard developer for the Departmental Administration of the US Department of Agriculture. He has advised clients in data visualization and human capital analysis to improve the federal employee experience. Andrew graduated with a BA in International Relations, and a minor in Data Science.





## Chris Maher '79

Retired Principal  
EY

Chris retired from EY as a senior advisor where he consulted clients on regulatory reform, risk management and finance transformation.

He serves on the board of Sumitomo Mitsui Trust Bank (U.S.A.) Limited, a subsidiary of the Sumitomo Mitsui Trust Bank, Limited of Japan. He has assisted the U.S. Attorney's Office, Federal Bureau of Investigation and Commodity Futures Trading Commission as an expert witness. He was seconded to the International Monetary Fund on a technical assistance mission to advise the State Central Bank of Turkmenistan while he was with the Federal Reserve Bank of New York. Chris is an active volunteer with Scouts BSA focusing on youth leadership development. Chris earned his BBA in Management from William & Mary.



## Taylor C. Robertson '23

Associate Boston  
Consulting Group

Taylor C. Robertson is an associate at Boston Consulting Group based in Washington, D.C. As a first-year associate, Taylor has been heavily client-facing, working in the consumer packaged goods industry, traveling internationally and domestically most weeks since starting in January of 2024, and has focused on revenue growth, pricing strategy, and promotions strategy. Prior to BCG, Taylor had one summer consulting internship at a smaller company, SC&H. Taylor graduated magna cum laude from William and Mary in May 2023 with a BBA in Finance and a minor in Creative Writing.



## David Welch '97

Retired Senior Partner and Managing Director  
Boston Consulting Group

David retired from the Washington, DC office of the Boston Consulting group in 2024 as a Senior Partner and Managing Director. Before retiring, David was the global leader for the People and Organizations topic in the retail sector. In this capacity David advised clients and team on issues of productivity, talent, leadership, and organizational design. Additionally, David served as the leader of BCG North America's Career Development function.

# Corporate Finance



## Melissa Ballenger '92

### Foundation Trustee & Adjunct Professor W&M Mason School of Business

Melissa's 30+ year career has concentrated in banking, payments and fintech. Melissa served in CFO roles at global public companies including State Street Bank (EMEA), Santander Bank and TD Bank. A CPA, Melissa served as MasterCard's Chief Accountant and Controller. Most recently, she pivoted to serve as CFO of a PE-backed, founder-led fintech. She successfully led IPO preparation and Series D equity funding, and later served as Senior Advisor to the Board of Directors. Melissa has demonstrated global leadership both in the US and internationally, directing major corporate priorities including strategic and financial planning and execution, capital markets, finance transformation initiatives and M&A. She led companies during periods of high growth in domestic and global markets, as well as managing proactively through several economic downturns. She holds a B.B.A. in Accounting from the College of William & Mary and began her career as an Arthur Andersen auditor. Melissa is proud to serve on the W&M Mason School of Business Foundation Board of Trustees. Her other Board experience includes European financial services, and she is credentialed as a Certified Director by the National Association of Corporate Directors (NACD).







## Bill McCamey '91

### Chief Financial Officer

#### Atlanticus

Bill McCamey became Chief Financial Officer of Atlanticus Holding Company in January 2014. He served as Treasurer from the time he joined Atlanticus in 2004 to 2015. McCamey has over 27 years of experience in capital markets and finance, including his years at Wachovia Bank from 1993 until he joined Atlanticus. Bill lives in Atlanta, Georgia with his beloved wife, Megan, and their four children.



## Hull McKinnon '95

### Chief Operating Officer

#### RemoteLock

Career leading growth-oriented companies, initially as a tenured venture capital investor and subsequently in internal CEO/COO/CFO operator roles - driving enterprise value and monetizing business for shareholders at a couple dozen companies throughout career. Most recently, COO at two fast growing software technology companies, and Partner/CFO at a high net-worth multi-family investment office managing over \$2.0 billion in assets that specialized in providing access to private company investments around the globe. Hull's formative experience is rooted from sixteen years as a venture capitalist. He served as a General Partner at an energy technology-focused venture fund. Hull was an integral part of establishing the firm as one of the two General Partners that created a successful venture fund brand, raising multiple funds and managing \$300 million in assets. He was primarily responsible for sourcing/investing in companies and actively overseeing their success, in addition to co-managing the firm. Hull has served on numerous boards of directors for growth oriented, private equity backed companies. He also has taken occasional active operational roles with portfolio companies, roles ranging from leading transactions to serving as CEO, including serving as CEO of a wind turbine and microgrid company. His early career was with PricewaterhouseCoopers, as a CPA, after earning his Bachelor of Business Administration degree from The College of William and Mary.



## Philip Roane '06

### Strategy and M&A Professional

Philip is a frequent lecturer at W&M and was a founding officer of the Howard J. Busbee (HJB) Finance Academy 20 years ago. Phil 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.

# Hedge Funds



## Dan 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 Tiger Global, he worked in private equity at Apollo and M&A at Morgan Stanley. Dan graduated from The College of William & Mary with a BBA in Finance.



## Austin Camporin '04

Portfolio Manager

Elliott Management Corporation

Austin Camporin is a portfolio manager at Elliott Management Corporation, a New York-based investment fund with approximately \$70 billion in assets under management. He joined Elliott in 2009, focusing primarily upon public equity and credit opportunities. Prior to joining the firm, Mr. Camporin began his career at JPMorgan, first as a high-yield credit analyst and later moving to the distressed debt proprietary trading group. Mr. Camporin has and continues to serve on multiple boards of directors, is a CFA charterholder, and is also co-president and founder of the Good Shepherd of Darien Foundation and co-founder of A Second Chance for Ziva dog rescue. He graduated summa cum laude from the College of William & Mary in 2004 with a Bachelor of Business Administration in finance.



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## Matthew Siano '96

Chief Legal Officer

Five Bells Settlement Corp.

Matthew Brady Siano, Esq. currently serves as the Chief Legal Officer of Five Bells Settlement Corp., a software start-up in the crypto space. From July 2004 through July 2023, Mr. Siano was Managing Director, General Counsel/Chief Legal Officer of Two Sigma Investments, LP and all its various domestic and international affiliates, a group of global investment managers and broker/dealers specializing in quantitative investing and advising across a broad range of asset classes with greater than \$50 billion assets under management. As Two Sigma's General Counsel/Chief Legal Officer, Mr. Siano was responsible for the firm's global legal, regulatory, compliance and government affairs matters and was the head of their legal, compliance and government affairs departments. Mr. Siano joined Two Sigma in July 2004 and left full-time employment at Two Sigma in December 2023. On January 1st, 2024, he transitioned to his current status as Managing Director – Emeritus of Two Sigma. From September 1999 through June 30, 2004, Mr. Siano was an associate in the Investment Management Group of Seward & Kissel LLP, a New York City-headquartered law firm with an industry-leading hedge fund practice. Mr. Siano (proudly) graduated cum laude from William & Mary in 1996 with a B.A. 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, earning High Honors. In 1999, Mr. Siano earned a J.D. 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 has also been an adjunct professor on both the undergraduate and graduate levels at the Mason School of Business, the business school of William & Mary in Virginia for over twelve (12) years.



# 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 buy-side 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**

Garrett is an Associate on the RBC Corporate Banking Team covering Healthcare and Consumer. He is responsible for structuring and negotiating loan transactions, managing client relationships, and preparing credit submissions and managing the approval process. Garrett holds a BA in Finance from William and Mary. On a personal note, Garrett enjoys skiing, scuba diving, good food and history.





## 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 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

Max has experience advising companies as well as financial sponsors regarding distressed situations including pre-crisis scenarios, out-of-court workouts, and court-supervised reorganizations. Additionally, he has worked with clients to develop and execute effective private debt and structured equity placements across the capital spectrum and a multitude of industries.



## 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.



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## 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 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.



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## 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.





# Private Equity & Alternative Investments



## Ryan Bolowsky '16

Vice President  
iCON Infrastructure

Ryan Bolowsky is a Vice President on the investment team at iCON Infrastructure, an infrastructure private equity firm focused on middle-market investments across North America and Europe. At iCON, Ryan is primarily responsible for originating, executing and overseeing investments across iCON's funds, with a focus on opportunities within the environmental infrastructure sector. Prior to joining iCON, Ryan worked at Macquarie Asset Management (MAM) where he focused on investments on behalf of Macquarie's North American infrastructure funds as well as strategic acquisitions in the asset management space on behalf of MAM. Before Macquarie, Ryan held roles at Apollo Global Management and Houlihan Lokey where he started his career as an analyst in the firm's FIG investment banking group. Ryan holds a BBA in Finance from the College of William & Mary.





## Aaron Hurwitz '08

### Principal The Carlyle Group

Aaron Hurwitz is a Principal at The Carlyle Group within the US Buyout Fund, focused on buyouts and growth equity investments in the aerospace, defense and government services sectors. He is based in Carlyle's Washington, DC office and lives in McLean, VA. Mr. Hurwitz has been a key contributor to a number of Carlyle's investments, and currently serves as a director on the boards of Loc Performance, Armada (IMIA), and Global Jet Capital. Mr.

Hurwitz is also actively involved with Carlyle's investment in StandardAero. Prior Carlyle portfolio company leadership includes Titan Acquisition Holdings and PrimeFlight Aviation Services. 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.



## Gabby Lewis '20

### Associate The Carlyle Group

Gabby Lewis is an associate on Carlyle's U.S. Real Estate Transaction team based in Washington, D.C. Gabby has over four years of experience working in real estate private equity, and has worked across asset classes (office, multifamily, industrial, IOS, BTR, MH) nationally. She is responsible for underwriting prospective acquisitions and ground-up developments, and performing due diligence. Gabby earned a B.B.A. in finance from William & Mary, graduating magna cum laude.







## Tiffany Theriault '10

Managing Director

Apollo Global Management

Tiffany Theriault joined Apollo Global Management in 2021 where she is a Managing Director on the real estate credit team. She is responsible for originating and structuring commercial real estate mortgage and mezzanine loans on behalf of Apollo's permanent capital balance sheets and managed funds. Prior to joining Apollo, Tiffany spent 10 years at Goldman Sachs in the Real Estate Financing Group where she was the co-head of large loan originations. Tiffany serves on the board of directors of Creative Art Works, a non-profit focused on providing youth art programs to underserved communities in New York City. Tiffany graduated summa cum laude from the College of William & Mary with a Bachelor of Business Administration in Finance and serves as the course co-lead for Intro to Commercial Real Estate Finance at the College of William & Mary.



## Brandon Wolfe '07

Co-Founder/Partner

Jordan Partners

Brandon Wolfe is Co-Founder / Managing Partner at Jordan Partners. Prior to forming Jordan, he invested for six years at Tiger Management, the family office of Julian Robertson, in New York. At Tiger Management, Brandon researched public stocks and private companies. Before Tiger Management, Brandon invested at Jet Capital Investors and Cascabel Management and taught middle school math via Teach For America. Raised in Covington, Virginia, he graduated Phi Beta Kappa with a bachelor's degree in History from the College of William & Mary and earned a JD from Stanford Law School and an MBA from the Stanford Graduate School of Business.



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## Public & Nonprofit Finance



### John Kandrac '03

#### Group Manager Federal Reserve Board

John Kandrac is an economist and group manager in the Division of Research & Statistics at the Federal Reserve Board of Governors in Washington, D.C. Prior to that, he was a Principal Economist in the Board's Division of Monetary Affairs, where he focused on implementing monetary policy amid near-zero interest rates. John's research focuses on topics in banking, financial intermediation, and monetary policy. Before pursuing his doctorate, John worked as an Analyst and Portfolio Assistant at J.P. Morgan Asset Management in New York and Atlanta. John received a B.B.A. from William & Mary in 2003, majoring in finance and minoring in physics while running a small construction business. He holds a Ph.D. in economics from the University of Oregon. John resides in Springfield, Va., with his wife Jenny and their three young children.



### Daniel Owens '05

#### VCU Health Systems Emergency Medicine Resident

Daniel is an Emergency Medicine Resident and Chief Strategy Officer for Foundations of Emergency Medicine. The primary focus of his work has been to formalize business processes and develop and recruit capacity to help sustainably scale the work, which is used in over 70% of EM Residency programs nationwide and is expanding internationally. Daniel started his journey teaching with Teach for America, followed by working for JP Morgan in their Private Wealth division. Daniel helped start The Learning Accelerator, a non profit incubator for technology-enabled classrooms and was a founding Board Member of the Technology Education Consortium.





## Megan McCamey '91

### Founding President goBeyondProfit

Megan McCamey is the founding President of goBeyondProfit, a venture philanthropy built for and with CEOs. goBeyondProfit is a growing network of more than 2,100 CEOs who pledge to operate generous businesses and improve lives. goBeyondProfit provides original content geared toward businesses of all sizes and industries such as research reports, peer interviews and award-winning digital resources. She is also the CEO and co-founder of a new venture, Belay Guidance Company, that puts preventative science at parents' fingertips with their digital mental health platform of customized, real-time expertise that makes today easier and the future brighter. Earlier in her career Megan was Senior Advisor to the CEO for Points of Light and founding President of the Civic Incubator where she built new enterprises through mergers/acquisitions and joint ventures between for-profits and non-profits. At McKenna, Long & Aldridge, Megan led the firm-wide philanthropic and community impact strategy including a multi-faceted effort to fight human trafficking nationwide. She also worked closely with the founders of Green Print as strategic advisor and early-stage investor helping build the carbon investment strategy and negotiate social purpose partnerships as they launched a sustainability solutions company. She has served as Chair of the Board of Visitors for Emory University as well as on the boards of Wake Forest University's Advisory Council on Entrepreneurship & Innovation and Candler School of Theology. She also served as President of Parents Council, and various other roles for the Westminster Schools where her four children attended. Megan lives in Atlanta with her husband Bill McCamey ('91).



# Quantitative Finance



## Richie Bellucci '20

Associate

BMO Capital Markets

Richie is an associate on the Structured Credit Origination team at BMO Capital Markets in New York. In Richie's three years on the team, he has worked across the desk in CLO Trading, Private Credit / Leveraged Loan Financing, and CLO Origination, with the majority of his time spent structuring both New Issue CLO's and financing facilities for different broadly syndicated and middle market CLO managers. Richie has worked at BMO since graduating in 2020, having spent time on various trading desks including U.S Rates, Leveraged Loans, and CMOs.



## Jessica Burt '02

Managing Director

BlackRock

Jessica K Burt, Managing Director, is head of BlackRock's client platform tech enablement strategy within the global client businesses. Prior, Ms. Burt led the global platform and business strategy for BlackRock Investment Stewardship (BIS), overseeing daily operations and strategic initiatives for BIS. Ms. Burt also headed the Voting Platform known as 'Voting Choice', 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 (now BTO) 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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## John Leone '91

### Managing Director, Head of Quantitative Strategy Wells Fargo

John joined Wells Fargo in 2019 as Director of Quantitative Strategy and a Managing Director. In his current role, John is responsible for enhancing Wells Fargo's hedge fund financing products and direct market access platforms geared for quantitative managers. Prior to joining Wells Fargo, John worked with Stevens Capital Managements or its associated companies for 26 years. John was primarily responsible for accessing global exchanges, equity financing structures, and prime broker management. During his career, John 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 Bohley 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. John holds a bachelor's degree in economics from The College of William & Mary, is a CFA Institute Charterholder and recipient of the Howard J Busbee Finance Academy Alumni Award. John's civic and community activities include: Girard College Foundation Board, Vice President, Pennsylvania State University Parents Philanthropy Board, and The College of William and Mary Women's Leadership Summit Advisory Council.



## Research



### Lynsey Prout '20

Equity Research  
Bank of America

Lynsey Prout is an Equity Research Associate at Bank of America in New York, where she covers U.S. Power & Utility companies. Before her current role, Lynsey worked in Business Operations & Strategy at late-stage fintech startup, Figure Technologies. Lynsey began her career post-W&M at Morgan Stanley, where she was an Equity Capital Markets Analyst covering Energy, Clean Tech, and Basic Materials. She earned a B.B.A. in Finance with a concentration in Management and Organizational Leadership from William & Mary, graduating summa cum laude. At W&M, Lynsey was on the Women's Lacrosse Team and was involved with Smart Women Securities.



### Will Rosenbaum '19

Buy Side Research Analyst  
Susquehanna International Group

Will Rosenbaum is a Buy Side Research Analyst with Susquehanna International Group (SIG). SIG is a proprietary trading firm headquartered just outside of Philadelphia. In his five years with SIG, Will has covered a broad range of sectors including: Global Financials, Global Consumer, and Cryptocurrency. Will is a CFA Charter Holder and graduated summa cum laude with a degree in Economics.



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## Josh Siegler '16

Principal  
IRT

Josh Siegler is a Principal at IRT & IOT, a growth equity fund focused on investing in mid-to-late stage Digital Asset Ecosystem companies. Previously, he worked as the Head of Crypto and FinTech Equity Research at Cantor Fitzgerald. In the role, Josh conducted proprietary equity research, including deep dive industry primers and 21 initiations. Prior to Cantor Fitzgerald, Josh served as a senior equity research associate at Evercore ISI, covering 31 stocks across Payments, Processors, and IT Services. Before Evercore, Josh started his career at J.P. Morgan Asset Management, where he worked on a generalist investment management team with \$4 billion in assets under management held in a concentrated long-only portfolio. At J.P. Morgan, Josh was responsible for stock-selection and portfolio maintenance.



## Andrew Weeks '14

Director, Investment Analyst  
BlackRock

Andrew is a senior investment analyst on the US Growth Team at BlackRock, covering tech and industrial sectors. Andrew's team manages several long-only mutual fund strategies across the market cap spectrum, totaling ~\$35B in AUM. Prior to BlackRock, Andrew received his MBA at the University of Chicago, and prior to business school was a junior investment analyst at MFS Investment Management.



# Sales & Trading



## Miguel Abradu-Otoo '23

Global Markets Analyst  
TD Securities

Miguel Abradu-Otoo is a Global Markets analyst at TD Securities. He is currently on the short term interest rates desk where his team trades Repurchase Agreements and Treasury Bills. Prior to joining TD Securities, Miguel graduated from William and Mary's Raymond School of Business with a BBA in Finance with a concentration in accounting.



## Greg Shenkman '03

Loan Trader  
Shenkman Capital Management, Inc.

Greg 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.







## John Leone '91

Managing Director, Head of Quantitative Strategy  
Wells Fargo

John joined Wells Fargo in 2019 as Director of Quantitative Strategy and a Managing Director. In his current role, John is responsible for enhancing Wells Fargo's hedge fund financing products and direct market access platforms geared for quantitative managers. Prior to joining Wells Fargo, John worked with Stevens Capital Managements or its associated companies for 26 years. John was primarily responsible for accessing global exchanges, equity financing structures, and prime broker management. During his career, John 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 Bohley 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. John holds a bachelor's degree in economics from The College of William & Mary, is a CFA Institute Charterholder and recipient of the Howard J Busbee Finance Academy Alumni Award.

John's civic and community activities include: Girard College Foundation Board, Vice President, Pennsylvania State University Parents Philanthropy Board, and The College of William and Mary Women's Leadership Summit Advisory Council.



## Ryan Sells '07

Co-Founder & General Partner  
Dash Fund

Ryan is a co-founder & GP at Dash Fund – an early-stage venture capital fund focusing on FinTech investments. He is also the Head of BD at Turnstile, a FinTech startup back by First Round Capital that is automates the quote-to-cash stack for b2b businesses. Previously, he was Employee #7 and Head of BD at Second Measure (YC S15, acq. by Bloomberg). Post-acquisition, he led Bloomberg's Alternative Data Strategy as part of the Office of the CTO. Ryan was also Employee #8 and VP of Revenue at Pipe, an alternative-lending FinTech startup most recently valued at \$2 billion. Notably, he was the first business hire at each of Turnstile, Second Measure and Pipe. Ryan started his career at JP Morgan where he spent eight years in the sales & trading division. He holds a BBA from The College of William & Mary where he double majored in Finance & History while playing Division 1 soccer.

# Venture Capital, Startups, and Social Entrepreneurship



## Spencer Kushner '13

Founder & CEO  
Otter Learning

Spencer Kushner is the Founder & CEO of Otter Learning and the Managing Partner of Lunchline Holdings. Spencer began his career as an analyst in the Investment Banking Division at Goldman Sachs and subsequently as an Associate at Zelnick Media Capital, focused on Technology, Media and Entertainment investments. In 2018, Spencer co-founded Otter Learning to expand high quality early education across the US. Since that time, Otter Learning has become one of the nation's leading providers of early childhood education with operations in 8 states across the Southeast. Today, Otter Learning operates 63 locations and provides daily care to over 6,000 students aged 6 weeks to 12 years old. As the Managing Partner of Lunchline Holdings, Spencer oversees investments in a variety of sectors including education, industrial services and real estate.



## Francis Lyons '93

Founder & CEO  
ooPoll

With over 25 years of experience as a serial founder, patent-holder, and Emmy Award winning producer, I have a passion for developing technology and media that promotes equitable amplification of voices. As the founder and CEO of ooPoll, and founding partner of Truepic, I am expounding on my expertise in early-stage start-up and product development, technology innovation, media strategy, and video and live event production. My collaboration with media powerhouses like MTV, Vice and ESPN trailblazed a new era of media driven by a vision of a better world for our youth. I leverage my entrepreneurial experience and passion for education to advise and mentor innovators on pro-social business activation and media literacy projects.





## Megan McCamey '91

### Founding President goBeyondProfit

Megan McCamey is the founding President of goBeyondProfit, a venture philanthropy built for and with CEOs. goBeyondProfit is a growing network of more than 2,100 CEOs who pledge to operate generous businesses and improve lives. goBeyondProfit provides original content geared toward businesses of all sizes and industries such as research reports, peer interviews and award-winning digital resources. She is also the CEO and co-founder of a new venture, Belay Guidance Company, that puts preventative science at parents' fingertips with their digital mental health platform of customized, real-time expertise that makes today easier and the future brighter.

Earlier in her career Megan was Senior Advisor to the CEO for Points of Light and founding President of the Civic Incubator where she built new enterprises through mergers/acquisitions and joint ventures between for-profits and non-profits. At McKenna, Long & Aldridge, Megan led the firm-wide philanthropic and community impact strategy including a multi-faceted effort to fight human trafficking nationwide. She also worked closely with the founders of Green Print as strategic advisor and early-stage investor helping build the carbon investment strategy and negotiate social purpose partnerships as they launched a sustainability solutions company.

She has served as Chair of the Board of Visitors for Emory University as well as on the boards of Wake Forest University's Advisory Council on Entrepreneurship & Innovation and Candler School of Theology. She also served as President of Parents Council, and various other roles for the Westminster Schools where her four children attended. Megan lives in Atlanta with her husband Bill McCamey ('91)





## Ryan Sells '07

Co-Founder & General Partner  
Dash Fund

Ryan is a co-founder & GP at Dash Fund – an early-stage venture capital fund focusing on FinTech investments. He is also the Head of BD at Turnstile, a FinTech startup back by First Round Capital that is automates the quote-to-cash stack for b2b businesses. Previously, he was Employee #7 and Head of BD at Second Measure (YC S15, acq. by Bloomberg). Post-acquisition, he led Bloomberg's Alternative Data Strategy as part of the Office of the CTO. Ryan was also Employee #8 and VP of Revenue at Pipe, an alternative-lending FinTech startup most recently valued at \$2 billion. Notably, he was the first business hire at each of Turnstile, Second Measure and Pipe. Ryan started his career at JP Morgan where he spent eight years in the sales & trading division. He holds a BBA from The College of William & Mary where he double majored in Finance & History while playing Division I soccer.





## Introducing the Barzach-Roday Tribe Sandwich!

The Finance Academy could not be more thrilled to present the Barzach-Roday Tribe Sandwich as a token of appreciation for all that Dan Barzach and Harrison Roday have done for William & Mary and its students.

Since leaving Williamsburg, both Dan and Harrison have had incredible careers on and off of Wall Street – Dan is now a partner at Tiger Global Management, and Harrison recently ran for mayor of the city of Richmond.

Dan and Harrison once said, “We will know we have made it when we have a sandwich named after us.” We are happy to announce that this day has come! With the help of Paul’s Deli, we would like to present the Barzach – Roday Tribe Sandwich, and formally announce that both Dan and Harrison have both “made it.”

*The Barzach-Roday Tribe Sandwich is a turkey and pastrami sandwich with coleslaw and Russian dressing on seedless rye.*



Amy Hogg '25 & Charlie Unice '24 (Co-Presidents)

Abby Hauslanden '25, Elizabeth van der Voort '25 (Co-Presidents, Spring)

Madeline Briddell '25  
 Sam Burgunder '24  
 Sofia De Chiara '25

Gavin Dennis '27  
 Michael Foley '26  
 Drew Klepser '26  
 David Kordziel '27  
 Joe Spicer '26  
 Amar Srinivasan '26







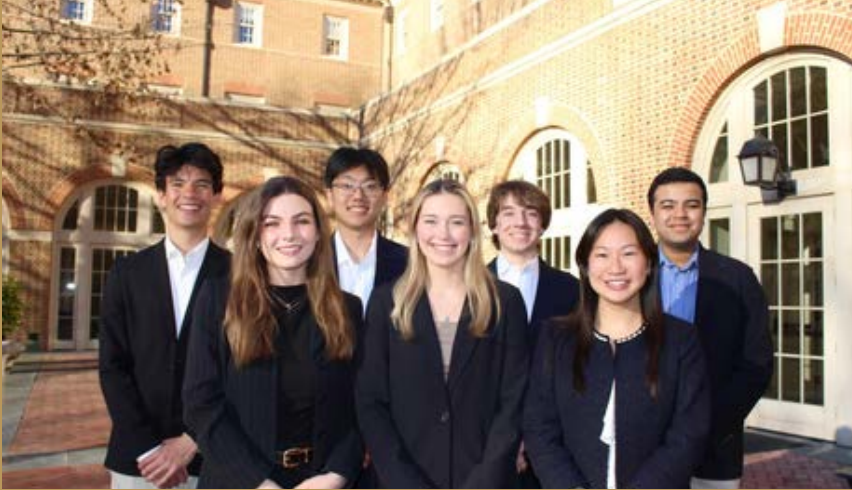
## **Women in Business**

**Michelle Feng  
Mia Milosevic  
Cierra Telleen  
Mairead Stack  
Alanna Leslie  
Uma Datar  
Lauren Trahon  
Alina Uzak**



## **Mason Investment Club**

**Luke Chamberlayne  
Jack Rizzo  
Raghav Adimulam  
Michael Foley**



**Braun  
Financial  
Literacy  
Program**

Ben O'Neill  
Madeline Walsh  
Joshua Yoo  
Emily Dumm  
Milo Weisbroth  
Ada Woo  
Pawan Kc  
Kendyl George



**Peer Industry  
Advisors**

Joe Spicer  
Madeline Briddell  
Divya Kumar  
Sofia De Chiara  
Matt Mandel  
Leah Pak  
David Dimitri  
Andrew Linton  
Rishi Rathnakaram  
Mahika Gupta  
Sam Burgunder  
Charlie Unice





**Peer  
Mentorship  
Program**  
Madeline Walsh  
Julia Loffredo  
Joshua Yoo  
Jack Rizzo



**Excel Modeling  
Club**  
Flora Wu  
Carson Foley  
Conor Downey  
Jack Biggs  
Sam Beal



**Craig Armstrong '92**

Senior Portfolio Manager  
at Insight Investment

W&M Degree:  
Finance

Term: 2023-2027

Committee:  
Curriculum and Special  
Topics Courses



**Biff Baker '90**

Managing Director and  
Senior Wealth Advisor  
MAI Capital Management LLC

W&M Degree:  
International Relations

Term: 2024-2027

Committee:  
Curriculum and Special  
Topics Courses



**John Curtiss '93**

National Product Development Leader  
Progressive Insurance

W&M Degree:  
Finance

Term: 2024-2027

Committee:  
Career Services and  
Student Engagement



**Mark Decker '97**

Founding Partner at Proterra  
Real Estate Partners

W&M Degree:  
History

Term: 2023-2026

Committee:  
Development and  
Membership (Chair)



**Dan Draper '91**

CEO at S&P Dow Jones  
Indices

W&M Degree:  
Economics

Term: 2023-2026

Committee:  
Development and  
Membership

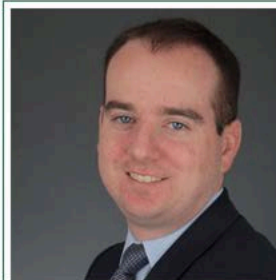


**Hilary Corman**

Head of Enterprise Sales  
State Street Global Advisors

Term: 2024-2027

Committee:  
Development and  
Membership



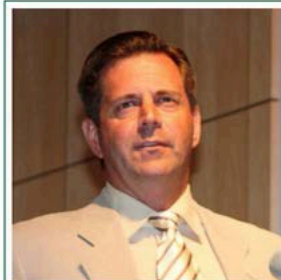
**Harold Eylward '98**

Managing Director, Head  
of Investment and  
Advice NY/East at JP  
Morgan Private Bank

W&M Degree:  
Accounting

Term: 2023-2027

Committee: Career  
Services and Student  
Engagement



**Mike Field '90**

President at HP  
Auto Fund

W&M Degree:  
Marketing

Term: 2023-2026

Committee:  
Development and  
Membership



**Matt Fiordaliso '04, '05**

Partner at Ai-Spark  
& Founder at FIVAS

W&M Degree:  
Accounting, MAcc

Term: 2023-2026

Committee: Curriculum  
and Special Topics  
Courses (Chair)



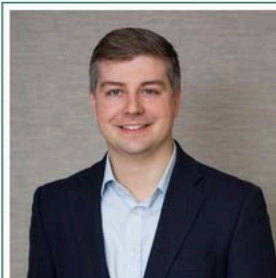
**Scott Gehsmann '84**

Recently Retired Deals  
Partner at PWC

W&M Degree:  
Accounting

Term: 2023-2026

Committee:  
Development and  
Membership



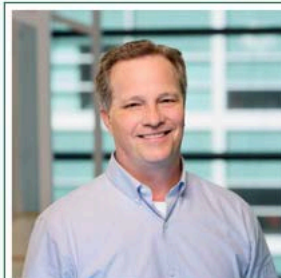
**William Glass '07**

Managing Director at  
Perella Weinberg  
Partners

W&M Degree: Finance &  
International Relations

Term: 2023-2027

Committee: Career  
Services and Student  
Engagement



**Matt Heist '91**

Former Vice President,  
Finance and Operations at Slack  
(acquired by Salesforce)

W&M Degree:  
Government

Term: 2023-2025

Committee: Career  
Services and Student  
Engagement





Ann Marie Higgins '06,  
'07

Partner at Ernst & Young  
LLP

W&M Degree:  
Accounting, MAcc

Term: 2023-2025

Committee: Career  
Services and Student  
Engagement



Laura Holden '06

Managing Director, M&A  
at BMO Capital Markets

W&M Degree:  
Finance

Term: 2023-2026

Committee:  
Development and  
Membership



Jon Lamb '07

Portfolio Manager at  
Orion Resource Partners

W&M Degree:  
Finance

Term: 2023-2026

Committee: Curriculum  
and Special Topics  
Courses



John Leone '91

Managing Director, Head  
of Quantitative Strategy  
at Wells Fargo

W&M Degree:  
Economics

Term: 2023-2026

Committee: Career  
Services and Student  
Engagement



Ed McGann '82

Managing Director,  
Global Head FX  
Platforms Business  
Development at BNY  
Mellon

W&M Degree:  
Economics

Term: 2023-2025

Committee: Career  
Services and Student  
Engagement (Chair)



Greg Melich '92

Partner, Research  
Analyst at Evercore ISI

W&M Degree:  
Economics

Term: 2023-2027

Committee: Curriculum  
and Special Topics  
Courses



Annelise Osborne '96

Chief Business Officer  
at Kadena

W&M Degree:  
Economics &  
Mathematics

Term: 2023-2026

Committee: Curriculum  
and Special Topics  
Courses



Russell Schmidt '07

Managing Director and Co-Head  
of Consumer & Retail  
Equity Capital Markets  
at Morgan Stanley

W&M Degree:  
Finance &  
History

Term: 2023-2026

Committee: Career  
Services and Student  
Engagement



Kevin Tunick '77

VP and Managing  
Director, Private  
Investments at UNC  
Management Company

W&M Degree: Business  
Administration

Term: 2023-2026

Committee: Curriculum  
and Special Topics  
Courses



Josephine Umana '93

Senior Vice President –  
Investments & Capital  
Markets COO at Freddie  
Mac

W&M Degree:  
Accounting

Term: 2023-2025

Committee: Curriculum  
and Special Topics  
Courses



Ari Untracht

Senior Director  
at Eldridge

Term: 2023-2026

Committee: Curriculum  
and Special Topics  
Courses



Chris Williams '06

Boehly Center Board  
of Advisors Chair

Managing Director at  
Motive Partners

W&M Degree:  
Finance

Term: 2023-2026

Committee:  
Development and  
Membership



# 18TH ANNUAL D2W

FROM DOG STREET TO WALL STREET

## PHOTOS

















































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