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Tuesday, November 18 - Thursday, November 20, 2025

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MENDOZA COLLEGE OF BUSINESS



Notre Dame Wealth Management Symposium

Tuesday, November 18 – Thursday, November 20, 2025

Tuesday, November 18 <i>The Linebacker Lounge, 1631 South Bend Ave, South Bend, IN 46617</i>	
6:30 – 8:30pm	Informal Welcome Reception Apps, Drinks, Meet-n-Greet
Wednesday, November 19 <i>215/216 McKenna Hall</i>	
8:00 – 8:30am	Breakfast
8:30 – 8:45am	Welcome/Opening Remarks Doug Ciocca '93 , Chief Executive Officer, <i>Kavar Capital Partners</i>
8:45 – 9:30am	<u>Session 1: “Who will manage the next trillion dollars?”</u> Kristen Bitterly Michell '02 , Global Head of Citi Wealth at Work, <i>Citi</i>
9:30 – 9:45am	Break
9:45 – 10:45am	<u>Session 2: WealthTech, AI and the Industry Panel Discussion</u> Dr. Nitesh Chawla , Frank M. Freimann Professor of Computer Science and Engineering, <i>University of Notre Dame</i> Steve Leivent , Senior Vice President, Co-General Manager, <i>SS&C Wealth & Investment Technologies</i> Vipin Mayar , Executive Vice President and Head of AI Innovation, <i>Fidelity Investments</i> Tony Xie '03 , Director of Product Management, Wealth Management Solutions, <i>Morningstar Investment Management</i> Moderator: Melissa Stolfi , Executive Vice President, Global Chief Operating Officer, <i>TCW</i>
10:45 – 11:30am	<u>Session 3: Wealth Manager Roundtable – Profile of a Highly Ranked Advisor/Team</u> Brad DeHond '97 , Managing Director, <i>Morgan Stanley</i> Joe McLean , Managing Partner, Family Office, <i>MAI Capital Management</i> Moderator: Matt Barthel '89 , Executive Editor, <i>Barron's</i>
11:45am – 1:00pm	<u>Lunch <i>Sponsored by Apollo</i> <i>Foley's, O'Neill Hall</i></u> Frank Barry '97 , Author, Speech Writer, Bloomberg Opinion Columnist
1:15 – 2:15pm	<u>Session 4: CEO Conclave Panel Discussion: Opportunities, Challenges, Positioning and Prudence</u> Mike Durbin '90 , Chief Executive Officer, <i>Cetera Financial Group</i> Mike O'Grady '87 , Chairman and Chief Executive Officer, <i>Northern Trust</i> Tom Zidar '90 , Chairman and Chief Executive Officer, <i>Wintrust Wealth Management</i> Moderator: Mike LaMena '95 , Chief Executive Officer, <i>Wealthspire Advisors</i>
2:15 – 3:15pm	<u>Session 5: Tax & Estate Planning Panel Discussion: Current & Generational Considerations</u> Tricia Buhrfiend '98 , Member, <i>Clingen, Callow & McLean</i> Scott K. Martinsen '91 JD , Partner, <i>Kembell, Woods & Martinsen</i> Patrick McCurry '98 , Partner, <i>McDermott, Will & Schulte</i> Moderator: Ryan Landsberg '10, '11 MSA , Partner, <i>Plante Moran Financial Advisors</i>
3:15 – 3:45pm	Break



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3:45 – 4:45pm	<p><u>Session 6: Investment Management Panel Discussion: Alpha Opportunities, Market Inefficiencies and Asset Allocation</u></p> <p>Martijn Cremers, Martin J. Gillen Dean and Bernard J. Hank Professor of Finance, <i>Mendoza College of Business</i> Corey Hill, Executive Director, <i>JP Morgan Asset Management</i> Chris Toomey, Managing Director, Private Wealth Advisor, <i>Morgan Stanley Private Wealth Management</i> Moderator: Cathy Stahl '92 SMC, Global Head of Marketing, <i>PIMCO</i></p>
4:45 – 5:45pm	<p><u>Session 7: WM Practice Transition/Succession/Sale Panel Discussion: Options for Off-Ramps</u></p> <p>Tom Freeman '87, Managing Director, Family Office Consultant, Senior PIM Portfolio Manager, <i>FCS Private Wealth Management</i> Sean Kelly, Vice Chairman, <i>Rothschild Wealth Partners</i> Katie St. Onge '06 MSA, Chief Operating Officer and Managing Director, Investor Solutions, <i>Constellation Wealth Capital</i> Moderator: Mark Tabit '82, Investor</p>
6:00 – 9:00pm	<p>Cocktails at 6:00pm, Seated Dinner at 7:00pm <i>Downes Ballroom (7th floor), Corbett Family Hall</i> Pete Bevacqua '93, Vice President and James E. Rohr Director of Athletics, <i>University of Notre Dame</i> Moderator: Thomas Galloway '87, Senior Global Relationship Manager, <i>Allspring Global Investments</i></p>
Thursday, November 20 215/216 McKenna Hall	
9:30 – 10:00am	<p>Prayer/Welcome/Opening Remarks</p> <p>Camille Bice '26, Co-President, <i>Paths to Private Wealth Management Club</i> Meghan Sabin '26, Co-President, <i>Paths to Private Wealth Management Club</i></p>
10:00 – 11:00am	<p><u>Session 1: Wealth Management – Framing the Opportunity & Navigating the Landscape</u></p> <p>Chris Cooke '87, Co-CEO, Partner, Wealth Advisor, <i>Cooke Financial Group</i> Kenneth Correa, Managing Director, Head of Business & Client Development, <i>Merrill Lynch</i> Moderator: Brian Bonvechio '93, Managing Director, Wealth Management Advisor, <i>Merrill Lynch Wealth Management</i></p>
11:00am – 12:00pm	<p><u>Session 2: Pathways to a Career in Wealth Management Panel Discussion</u> <i>Sponsored by Charles Schwab</i></p> <p>Kerrie Debbs '89, Managing Director, Wealth Advisor, <i>Farther</i> Scott Duba '03, Chief Investment Officer and President of Wealth Management, <i>Prime Capital Financial</i> James Keenan '82, President, <i>Walter & Keenan Wealth Management</i> Mike Landsberg '07, Senior Wealth Advisor, Shareholder, <i>HB Wealth</i> Moderator: Jill Matesic '95, Family Office Strategist, <i>Charles Schwab</i></p>
12:00 – 1:30pm	<p><u>Lunch Break/Presentation</u> <i>Lunch served in the Reception Foyer of McKenna followed by:</i> Fireside Chat with Tim Gerend '96 JD, Chairman, President and Chief Executive Officer, <i>Northwestern Mutual</i></p>
1:30 – 2:30pm	<p><u>Session 3: A Day in the Life of a Young Wealth Manager/The Science of Networking</u></p> <p>Noah Babin '07, Wealth Advisor, <i>Mariner</i> Victoria Coppola '24, Analyst, <i>JP Morgan Asset Management</i> Molly Fernandez '18, Director of Enterprise Customer Success, <i>YCharts</i> Benjamin Galloway '13, Senior Financial Advisor, <i>Greenspring Advisors</i> Andrew Lynch '13, '14 MSM, Senior Wealth Advisor, <i>Walter & Keenan Wealth Management</i> Connor Smith '22, Client Associate, <i>Rockefeller Capital Management</i> Moderator: Eryn Sportl, Head of University and Early Career Talent, <i>Fidelity Investments</i></p>

WEALTH MANAGEMENT SYMPOSIUM SPEAKERS

Noah Babin '07, Wealth Advisor, *Mariner*
Frank Barry '97, Author, Speech Writer, Bloomberg Opinion Columnist
Matt Barthel '89, Executive Editor, *Barron's*
Pete Bevacqua '93, Vice President and James E. Rohr Director of Athletics, *University of Notre Dame*
Kris Bitterly Michell '02, Global Head of Citi Global Wealth at Work, *Citi*
Brian Bonvechio '93, Managing Director, Wealth Management Advisor, *Merrill Lynch Wealth Management*
Tricia Buhrfiend '98, Member, *Clingen, Callow & McLean*
Dr. Nitesh Chawla, Frank M. Freimann Professor of Computer Science and Engineering, *University of Notre Dame*
Doug Ciocca '93, Chief Executive Officer, *Kavar Capital Partners*
Chris Cooke '87, Co-CEO, Partner, Wealth Advisor, *Cooke Financial Group*
Victoria Coppola '24, Analyst, *JP Morgan Asset Management*
Kenneth Correa, Managing Director, Head of Business and Client Development, *Merrill Lynch*
Martijn Cremers, Martin J. Gillen Dean and Bernard J. Hank Professor of Finance, *Mendoza College of Business*
Kerrie Debbs '89, Managing Director, Wealth Advisor, *Farther*
Brad DeHond '97, Managing Director, *Morgan Stanley*
Scott Duba '03, Chief Investment Officer & President of Wealth Management, *Prime Capital Financial*
Mike Durbin '90, Chief Executive Officer, *Cetera Financial Group*
Molly Fernandez '18, Director of Enterprise Customer Success, *YCharts*
Tom Freeman '87, Managing Director, Family Office Consultant, Senior PIM Portfolio Manager, *FCS Private Wealth Management*
Ben Galloway '13, Senior Financial Advisor, *Greenspring Advisors*
Thomas Galloway '87, Senior Global Relationship Manager, *Allspring Global Investments*
Tim Gerend '96 JD, Chairman, President, and Chief Executive Officer, *Northwestern Mutual*
Corey Hill, Executive Director, *JP Morgan Asset Management*
James Keenan '82, President, *Walter & Keenan Wealth Management*
Sean Kelly, Vice Chairman, *Rothschild Wealth Partners*
Mike LaMena '95, Chief Executive Officer, *Wealthspire Advisors*
Mike Landsberg '07, Senior Wealth Advisor, Shareholder, *HB Wealth*
Ryan Landsberg '10, '11 MSA, Partner, *Plante Moran Financial Advisors*
Steve Leivent, Senior Vice President, Co-General Manager, *SS&C Wealth & Investment Technologies*
Andrew Lynch '13, '14 MSM, Senior Wealth Advisor, *Walter & Keenan Wealth Management*
Scott K. Martinsen '91 JD, Partner, *Kembell, Woods & Martinsen*
Jill Matesic '95, Family Office Strategist, *Charles Schwab*
Vipin Mayar, Executive Vice President and Head, AI Innovation, *Fidelity Investments*
Patrick McCurry '98, Partner, *McDermott, Will & Schulte*
Joe McLean, Managing Partner, Family Office, *MAI Capital Management*
Mike O'Grady '87, Chairman and Chief Executive Officer, *Northern Trust*
Connor Smith '22, Client Associate, *Rockefeller Capital Management*
Eryn Sporn, Head of University and Early Career Talent, *Fidelity Investments*
Katie St. Onge '05 '06 MSA, Chief Operating Officer & Managing Director, Investor Solutions, *Constellation Wealth Capital*
Cathy Stahl '92 SMC, Global Head of Marketing, *PIMCO*
Melissa Stolfi, Executive Vice President, Global Chief Operating Officer, *TCW*
Mark Tabit '82, Investor
Chris Toomey, Managing Director, Private Wealth Advisor, *Morgan Stanley Private Wealth Management*
Tony Xie '03, Director of Product Management, Wealth Management Solutions, *Morningstar Investment Management*
Tom Zidar '90, Chairman and Chief Executive Officer, *Wintrust Wealth Management*

Noah Babin '07

Wealth Advisor
Mariner



Noah works with clients to develop personalized wealth management solutions that include tax planning, investment strategies and estate planning to help them achieve their goals.

Prior to joining Mariner, Noah was a wealth advisor with Beacon Pointe Advisors and a registered representative with PDK Investments. Before that, he founded MODL Investments, where he served as portfolio manager and principal providing comprehensive wealth planning and customized investment strategies to clients. Noah holds a bachelor's degree in business administration with a concentration in finance from the University of Notre Dame.

Away from the office, Noah enjoys coaching ice hockey and mental performance, golfing, jiu-jitsu and spending time with his wife and two daughters.

Frank Barry '97

Author, Speech Writer, Bloomberg Opinion Columnist



Frank Barry is a Bloomberg Opinion columnist and member of the editorial board covering national affairs. He is the author of the new book, *Back Roads and Better Angels: A Journey Into the Heart of American Democracy*. He served as chief speechwriter on the Bloomberg 2020 presidential campaign after having been director of speechwriting for Mayor Michael R. Bloomberg in City Hall, where he also helped create a variety of government and election reform initiatives. He is also the author of *The Scandal of Reform: The Grand Failures of New York, Political Crusaders and the Death of Nonpartisanship*. He received degrees from the University of Notre Dame and New York University.

Matt Barthel '89

Executive Editor
Barron's



Matt Barthel is Executive Editor in the Dow Jones Wealth and Asset Management group, overseeing the industry-leading financial advisor rankings at Barron's magazine. A financial journalist for over 30 years, Matt started his career at American Banker, covering consumer payment systems and financial technology. He also has worked at Registered Rep. magazine and the digital marketing firm Digitas. He joined Barron's in 2007. Matt has a B.A. in English from the University of Notre Dame, and he is utterly humorless on the subject of his alma mater's football team.

Pete Bevacqua '93

Vice President and James E. Rohr Director of Athletics
University of Notre Dame



Peter "Pete" Bevacqua is entering his second full year as University Vice President and James E. Rohr Director of Athletics after succeeding Jack Swarbrick on March 25, 2024. Bevacqua joined the University on July 1, 2023, in the role of Special Assistant to the President for Athletics, benefiting from the mentorship of Swarbrick before assuming leadership of the athletics department. In his short time leading the Athletics Department, Bevacqua has already squarely positioned himself as a leading voice nationally in regards to collegiate athletics, media rights, the importance of student-athlete experience, and name, image and likeness.

In his term on campus prior to moving into his Athletic Director position, Bevacqua helped negotiate an extension to Notre Dame and NBC's partnership and developed a framework with the College Football Playoff Management Committee to solidify a new television contract with ESPN. Prior to his time at Notre Dame, Bevacqua was the third chairman in the history of NBC Sports, leading NBC Sports in its unprecedented collection of assets and platforms, which included the Summer and Winter Olympic Games, Major League Baseball, the English Premier League, NASCAR, WWE, the Kentucky Derby, IndyCar and the Indianapolis 500, the Tour de France, French Open, USFL, the B1G Conference, Notre Dame Football, and numerous golf properties, including the PGA Tour, USGA Championships, the Men's and Women's U.S. Open Championships, LPGA, Ryder Cup and DP World Tour. He previously served as chief executive officer of the PGA of America. Among his many accomplishments, Bevacqua moved up the PGA Championship—one of golf's four majors—to May in the golf calendar and created the United States Ryder Cup Task Force. Prior to the PGA, Bevacqua served as Global Head of Golf at CAA. He was also Chief Business Officer for the USGA and served as the first Managing Director of the U.S. Open Championship. Additional roles Bevacqua has had include: World Golf Foundation Board of Directors' Chairperson; a PGA World Alliance leadership team member; Chairperson of the International Golf Federation; co-chair of RISE alongside Troy Vincent; and a special advisor to the Captains Club for The Memorial Tournament.

A 1993 graduate of Notre Dame, he went on to earn his Juris Doctor from Georgetown University Law Center in 1997, where he graduated cum laude. He began his career as an associate at Davis Polk & Wardwell in New York City. Bevacqua and his wife, Tiffany, have three children.

Kristen Bitterly Michell '02

Global Head of Citi Global Wealth at Work
Citi



Kristen has overall responsibility for delivering tailored financial strategies to working professionals within the legal, asset management, and professional services industries.

Prior to this, Kristen served as Head of Investment Solutions for Citi Global Wealth. In this role, she was responsible for leading our investments business globally, serving all our clients across Citi Global Wealth. This included delivering the entirety of our Investment product offering including performance, innovation, development, platform and sales. Kristen has spent over two decades in the industry leading teams at Citi, Credit Suisse and JP Morgan. A fluent Spanish speaker, Kristen has extensive experience covering clients globally and speaks regularly in the media and at industry conferences, presenting in both English and Spanish.

Kristen holds a BA in Economics and Spanish Language & Literature from the University of Notre Dame (summa cum laude) and an MBA from the Kellogg Graduate School of Management at Northwestern University.

Brian Bonvechio '93

Managing Director, Wealth Management Advisor
Merrill Lynch Wealth Management



Brian joined Merrill Lynch Wealth Management in January of 2002 and concentrates his efforts on wealth management for individuals, as well as investment management and consulting services for corporate and philanthropic clients. Brian has received the Global Institutional Consultant and the Retirement Benefits Consultant designations from the firm and works closely with institutional clientele in those capacities. Prior to joining Merrill, Brian worked as a CPA in the assurance and corporate tax groups of KPMG Peat Marwick LLP focusing on the financial services industry, although in his current role at Merrill he does not provide legal or tax advice.

Brian received his bachelor's degree with a double major in finance and accounting from the University of Notre Dame and his MBA degree from Case Western Reserve University. He earned his Chartered Financial Analyst®, CFA® designation in 2003, his

Chartered Retirement Planning Counselor, CRPCTM designation in 2008 and his Certified Private Wealth Advisor, CPWA® designation in 2020.

Tricia Buhrfiend '98

Member
Clingen, Callow & McLean



Ms. Buhrfiend is a member with the firm, representing individuals, high-net-worth families and business owners, and concentrates her practice on estate planning, estate administration, taxation, succession planning and other general corporate matters.

Ms. Buhrfiend assists her clients in preparing custom revocable trusts, wills, irrevocable trusts, limited partnership, limited liability company agreements, shareholder agreements and various other wealth-planning and corporate agreements. She also has substantial experience in assisting individuals and business owners with asset protection strategies, corporate recapitalizations, installment sales and other tax-planning techniques and tax-related issues.

Ms. Buhrfiend draws upon her experience as a certified public accountant (CPA) structure estate plans, and to review and manage complex estate and gift and income tax returns and valuation issues.

After college, Ms. Buhrfiend worked in public accounting at a large public accounting in Chicago, Illinois. After law school and prior to joining the firm, Ms. Buhrfiend practiced law at Mayor Brown, LLP in Chicago, Illinois as a transactional income tax attorney (focusing on partnership tax issues) and enhanced her practice as a tax, estate planning and corporate attorney at a firm in the Chicago suburbs.

She has served in several leadership positions with the DuPage County Bar Association and the Fox Valley Estate Planning Council. She is also a frequent speaker on various tax, estate planning and corporate-related topics.

Ms. Buhrfiend resides in Elmhurst with her husband and three children. Personally, Tricia enjoys entertaining and spending time with friends and family. She also enjoys visiting her parents' farm in Iowa and watching college football games.

Dr. Nitesh Chawla

Frank M. Freimann Professor of Computer Science and Engineering
University of Notre Dame



Nitesh V. Chawla is the Frank M. Freimann Professor of Computer Science and Engineering at the University of Notre Dame. He is the Founding Director of the Lucy Family Institute for Data and Society. He also holds concurrent faculty appointments in the Department of Applied and Computational Mathematics and Statistics in the College of Science and the Department of Information, Technology, Analytics and Operations in the College of Business.

He is a Fellow of the American Association for the Advancement of Science (AAAS), the Association for the Advancement of Artificial Intelligence (AAAI), the Association for Computing Machinery (ACM), and the Institute of Electrical and Electronics Engineers (IEEE).

Chawla, who joined the Notre Dame faculty in 2007, is an expert in artificial intelligence, data science, and network science, and is motivated by the question of how technology can advance the common good through interdisciplinary research. As such, his research is not only at the frontier of fundamental methods and algorithms but is also making interdisciplinary and translational advances for societal impact.

Chawla is the recipient of multiple awards for research and teaching innovation including Outstanding Teacher Awards at Notre Dame, a National Academy of Engineers New Faculty Fellowship, and a number of best paper awards and nominations. He also is the recipient of the 2015 IEEE CIS Outstanding Early Career Award; the IBM Watson Faculty Award; the IBM Big Data and Analytics Faculty Award; and the 1st Source Bank Technology Commercialization Award.

In recognition of the societal and community driven impact of his research, Chawla was recognized with the Rodney F. Ganey Award and Michiana 40 under 40 honor.

At Notre Dame, Chawla is also a Fellow at the Kellogg Institute for International Studies; the Kroc Institute for International Peace Studies; the Liu Institute for Asia and Asian Studies; the Pulte Institute for Global Development; and the Reilly Center for Science, Technology, and Values. He serves on the steering committee for the Health and Wellbeing Initiative and Technology Ethics Center.

Chawla is the co-founder of Aunalytics, a data science software and cloud computing company.

Doug Ciocca '93

Chief Executive Officer
Kavar Capital Partners



Doug possesses over 32 years of experience in the field of investments and portfolio management. He specializes in designing asset allocation strategies for individual and institutional clients. After graduating from the University of Notre Dame in 1993, Doug attended the University of Chicago, receiving an MBA in Finance. Doug is a regular guest on Bloomberg Radio and is quoted periodically in the financial press. Originally from Upstate New York, Doug currently resides with his family in Leawood, Kansas.

Chris Cooke '87

Co-CEO, Partner, Wealth Advisor
Cooke Financial Group



Chris has been an integral part of the evolution of the Cooke Financial Group, from his introduction in 1992 as Managing Director of Investments, to the 2016 move to independence and the launch of Sanctuary Wealth, now one of the fastest-growing hybrid RIAs in the country. Cooke Financial Group is the inaugural team on Sanctuary's exclusive Partnered Independence platform with Chris as one of the Sanctuary Founders.

Prior to joining Cooke Financial Group, Chris was an accountant at Ernst & Young. His experience in auditing, performance monitoring, and risk management was instrumental as the team continuously developed their service capabilities. Today, Chris' expertise is concentrated in wealth management, retirement planning and estate planning. Chris is a non-practicing CPA and attorney. He enjoys waterskiing, tennis, travel, and horses. He and his wife Elizabeth have three grown children.

Victoria Coppola '24

Analyst
JP Morgan Asset Management



Victoria Coppola graduated from the University of Notre Dame, where she majored in Political Science and double minored in Business Economics and Digital Marketing. She joined J.P. Morgan Asset Management as an intern in 2023 and returned as a full-time analyst in the Client Rotational Program in 2024. Currently, Victoria supports the Investment Broker Dealer (IBD) channel and the Subadvisory channel in her second rotation of the program. She is a bilingual speaker of Spanish and English. Born and raised in New Jersey, Victoria loves the Jersey Shore.

Kenneth Correa

Managing Director, Head of Business and Client Development
Merrill Lynch



Kenneth Correa is a Managing Director at Merrill Lynch and serves as the Head of Business and Client Development. In this role, he leads the company's business development and client growth strategy. Beyond overseeing the enterprise lead generation strategy, execution of digital leads, cross line of business efforts, and its national strategic growth markets strategy, he partners with Merrill's and Bank of America's products and services leadership teams, including field specialists, to drive seamless integration and field adoption across the company.

Ken also leads experienced Financial Advisor recruiting, The Merrill Practice Management Consulting Group, Experienced Financial Advisor & Field Leader Development Training, the National Resident Director Strategy, the Strategic Advisor Growth Network, and the firm's Top Advisor Recognition Programs.

In addition to being the Market Sponsor for New Mexico and El Paso, TX, Ken is the Executive Sponsor for Bank of America's HOLA (Hispanic Latino Organization for Leadership & Advancement) Network, Merrill Opportunity & Inclusion Council, and its Hispanic Latino Advisory Council.

A native New Yorker, Ken started his career on Wall Street with UBS Global Wealth Management in 1998, where he spent 21 years in various leadership roles, before joining Merrill Lynch in 2019 as the Market Executive of the Manhattan East Market. Prior to his current role as Head of Business and Client Development, he was the Market Executive of the Rockefeller Center Market where he was responsible for approximately 300 financial professionals managing \$40 billion in client assets.

While at UBS, Ken was the winner of the 2016 "Edward J. Connolly Leadership Award," the highest and most coveted award at UBS by a field leader as it reflects commitment to its employees and its community, integrity, performance, and collaboration across the firm. In addition to being the Market Head of its Metropolitan Market, Ken was also Chair of UBS Global Wealth Management's employee diversity network, MOSAIC.

A holder of the Certified Financial Planner designation (CFP®), Ken earned an MBA from Columbia University with honors and graduated Cum Laude from Queens College with a Bachelor of Arts degree in Economics/Finance and with a Minor in Business & Liberal Arts. While at Columbia University, he received the "Ethan R. Hanabury Student Representative" award for leadership. A resident of Bronxville, NY, he enjoys spending his free time with family and participating in active sports.

Martijn Cremers

Martin J. Gillen Dean and Bernard J. Hank Professor of Finance
Mendoza College of Business



K.J. Martijn Cremers serves as the Martin J. Gillen Dean and the Bernard J. Hank Professor of Finance at the University of Notre Dame's Mendoza College of Business. Cremers served as interim dean starting in 2018 before accepting the position in 2019; he was recently reappointed to serve a second term that will run through 2029.

Prior to joining Notre Dame in 2012, Cremers was a faculty member at the Yale School of Management from 2002 to 2012. His research and teaching areas are investment management, corporate finance, corporate governance, corporate law, business ethics, and Catholic social thought.

Cremers' research currently has over 14,000 Google citations. His best-cited paper, "How Active is Your Fund Manager? A New Measure That Predicts Performance," published in 2009 in the *Review of Financial Studies*, introduced Active Share, an innovative tool for determining the extent of active mutual fund management by measuring the percentage of stock holdings in a manager's portfolio that differs from the benchmark index. Active Share has become widely used in the financial industry and was incorporated in Morningstar Direct and FactSet. His recent awards and distinctions include receiving an honorary degree in 2019 from Holy Cross College at Notre Dame, where he served as the 2019 commencement speaker. Cremers has long-standing consulting relationships with various investment managers, including Touchstone Investments. He serves as an independent director at Ariel Investments, an investment company located in Chicago, since 2018.

A native of the Netherlands, Cremers earned his master's degree from the Free University Amsterdam and his Ph.D. from New York University's Stern School of Business. Cremers and his wife Liesbeth reside in South Bend, Indiana, and have six children.

Kerrie Debbs '89

Managing Director, Wealth Advisor
Farther



Kerrie brings 37 years of experience in financial services, with the last two decades devoted to providing tailored investment and planning guidance to individuals and families. She partners with clients to navigate every stage of their financial lives, building long-term relationships grounded in trust and personalized strategy. Kerrie has held the Certified Financial Planner™ (CFP®) designation since 2008.

Kerrie began her career at Merrill Lynch and after two decades moved to the Registered Investment Advisor space as a partner in a growing firm. She presently serves clients at Farther.

Kerrie graduated from the University of Notre Dame and earned her MBA from Fordham University. Over her career, she has worked in financial centers from New York and London to Red Bank, NJ, and now calls Cary, NC home, where she lives with her husband. Outside of work, Kerrie enjoys golf, running outdoors, and bringing people together socially — often while splitting time between North Carolina and visits with her clients across the country.

One Notre Dame fast-fact about Kerrie: she co-captained the ND women's golf team and later served on the Monogram Club Board of Directors, chairing the Student Welfare & Development committee.

Brad DeHond '97

Managing Director
Morgan Stanley



Drawing on over 25 years of experience working with ultra-high net worth clients, Brad DeHond provides comprehensive wealth management solutions to a select clientele of highly accomplished entrepreneurs, executives and their families. Brad has extensive experience working with clients and their tax and legal advisors on strategies to address complex trust and estate issues. He also concentrates on strategic and tactical asset allocation of client portfolios.

Dedicated to building enduring multigenerational relationships, Brad has become one of the leading financial advisors in the United States. In 2025, he was named to Forbes' Best-In-State Wealth Advisors for the eighth straight year. He was named to Barron's Top 1200 Financial Advisors from 2015-2024.

Brad received his B.A. from the University of Notre Dame in 1997 and joined Morgan Stanley that same year. He joined Morgan Stanley Private Wealth Management to partner with Private Wealth Advisor Jim Moriarity in 2000. Brad sits on the Board of Directors of the Daniel Murphy Scholarship Fund and is an executive-in-residence for the Investment Executive Fellows Program at the University of Notre Dame Institute for Global Investing.

Scott Duba '03

Chief Investment Officer & President of Wealth Management
Prime Capital Financial



Scott Duba is Chief Investment Officer and President of Wealth Management at Prime Capital Financial. In his role, Scott oversees all the firm's asset management and private investment strategies for both wealth management and retirement plans. He is responsible for leadership of research, portfolio management, and the firm's trading functions. In addition, Scott is strategically engaged with the firm's wealth management business. His responsibilities extend to governance as a member of the Board of Directors, Chairman of the Investment Advisory Board, and a member of the Wealth Advisory Committee.

Previously, he served as a Director and Portfolio Manager at Mariner Wealth Advisors where, among other responsibilities, he managed private equity investments and he led the firm's cryptocurrency strategy, including extensive research and writing on digital assets and blockchain. Scott was also the co-founder of Antora Peak Capital Management, a distressed debt hedge fund, and has held senior analyst roles at Artisan Partners, Neuberger Berman, and Lehman Brothers Asset Management.

Scott is a CFA Charterholder, has an MBA from the University of Chicago (Economics, Entrepreneurship, International Business), and a BA from the University of Notre Dame (Finance). He is also the founder and Managing Director of 425 Holdings, a strategic consulting firm.

Scott, his wife Erin, and their five children reside in the Kansas City area.

Mike Durbin '90

Chief Executive Officer
Cetera Financial Group



Mike Durbin is chief executive officer of Cetera Financial Group and a member of Cetera's board of directors. In his role as CEO, he oversees Cetera's growth initiatives, from expansion into new and adjacent markets to evolving Cetera's existing capabilities for the financial professionals and financial institutions it serves.

Most recently, Mike was head of Fidelity Institutional, a division of Fidelity Investments offering clearing, custody, investment products, brokerage, and trading services to a wide range of wealth management firms and institutions. In this role, Mike was responsible for supporting the growth of clients' businesses, enhancing their operational efficiency while delivering insights that help to drive confidence, clarity, and results. Previously, Mike served as head of Fidelity Institutional Investment and Technology Solutions where he focused on the end-to-end delivery of wealth management products

and technology solutions for Fidelity clearing and custody clients. Prior to that role, he served as president of Fidelity Wealth Technologies, where he oversaw Fidelity's acquisition of eMoney Advisor. He joined Fidelity in February 2009 as president of Fidelity Institutional Wealth Services where he was responsible for the oversight and growth of the business by providing clients access to a flexible, open-technology environment, extensive practice management resources and wealth management investments, and related execution and custody services.

Prior to joining Fidelity, Mike acted as chief operating officer of the National Sales Division for Morgan Stanley's Global Wealth Management. During his 18-year tenure with Morgan Stanley, he held various leadership positions, including head of Capital Markets, head of International Private Wealth Management and chief strategic and risk officer for the Global Individual Investor Group. Mike joined the firm in 1990, then titled Dean Witter Reynolds, Inc., in the investment banking field. In his initial roles, he was involved with the origination, structuring, and marketing of packaged investments for private client distribution.

Molly Fernandez '18

Director of Enterprise Customer Success
YCharts



Molly Fernandez is the Director of Enterprise Customer Success at YCharts, where she leads the Enterprise Customer Success team and partners with large RIAs, banks, and trust firms to drive adoption, retention, and strategic growth.

Since joining YCharts nearly five years ago, Molly has played a key role in shaping how the company supports and scales relationships across its largest client segments. Prior to YCharts, Molly worked in the Trust Advisory practice at Northern Trust, gaining experience in both account management and business development.

Molly graduated from the University of Notre Dame in 2018, and she now lives in Chicago with her husband, Alex, and their dog, Phoebe.

Tom Freeman '87

Managing Director, Family Office Consultant, Senior PIM Portfolio Manager
FCS Private Wealth Management



Tom founded FCS Private Wealth Management and FCS Family Office, an 20-person team managing approximately \$2.4 billion in assets (as of 6/2024). He focuses on providing investment planning/financial advisory and wealth management services to ultra high net worth individuals, families and institutions throughout the United States. Tom was named a Forbes Best-in-State Wealth Advisor in 2022 and 2023, and a Barron's Top 1,200 State By State Advisor 2022.

Ben Galloway '13

Senior Financial Advisor
Greenspring Advisors



Ben is a Senior Financial Advisor and CERTIFIED FINANCIAL PLANNER® in the firm's Private Client Group. Ben's practice focuses on serving the financial planning needs of business owners and executives, especially related to sudden wealth and intergenerational wealth transfers. His work includes a special emphasis on the unique needs of same-sex couples and other members of the LGBTQ+ community. Ben works with clients to develop financial, tax, and estate planning strategies specific to complex wealth needs, including concentrated stock, real estate, buy-sell agreements, and charitable giving. An enhanced and remarkable client experience through exceptional service is pivotal to Ben's practice. Whether it is helping clients sell a business, plan for retirement, save for college, or start a family, Ben prioritizes an educational and evidence-driven investment and planning approach.

Thomas Galloway '87

Senior Global Relationship Manager
Allspring Global Investments



Thomas (Tom) Galloway is a senior global relationship manager for the National Accounts team within the Global Relationship Management team at Allspring Global Investments. Prior to joining Allspring, Tom was at Franklin Templeton/Legg Mason, where he served as a senior vice president and national accounts manager. Tom has extensive experience working in the capital markets area of institutional equity sales, including serving as a managing director at Stifel Nicolaus, Wells Fargo Capital Markets, and Alex. Brown and Sons. He began his investment industry career in 1995. Tom earned a bachelor's degree in accounting from the University of Notre Dame and a master's degree in financial management from The School of Continuing Studies at Johns Hopkins University.

Tim Gerend '96 JD

Chairman, President, and Chief Executive Officer
Northwestern Mutual



Timothy J. Gerend, 53, is chairman, president, and chief executive officer of Northwestern Mutual. After joining Northwestern Mutual in 2002 as an attorney, he has held a number of leadership roles across the company—including law, compliance, field compensation and campus planning. Most recently as executive vice president and chief distribution officer, he was responsible for the company's go-to-market strategy, including the company's exclusive field force of more than 20,000 advisors and team members, and their strategic communications and marketing strategies. Under his leadership, Northwestern Mutual grew the largest, most productive, and most diverse field force in the company's history. Gerend is passionate about supporting opportunities for young people to grow toward their potential and ensuring that the industry is prepared to meet the needs of the future. Gerend has served on many philanthropic and industry boards and currently serves on the boards of the American

Council of Life Insurers and the Metropolitan Milwaukee Association of Commerce. Gerend is a graduate of Butler University with a bachelor's degree in economics and received his law degree from the University of Notre Dame.

Gerend was elected to the Board of Trustees in 2025. He serves as the chair of the Executive Committee and as a member of the Finance Committee. Gerend brings extensive knowledge of Northwestern Mutual's business from his over 20-year career at the company and considerable leadership and management experience to the Board of Trustees.

Corey Hill

Executive Director
JP Morgan Asset Management



In this role, Corey leads a team of specialists focused on helping financial professionals make informed decisions on topics pertaining to portfolio construction and manager selection. This consists of developing custom analytics, consulting on portfolio positioning, and maintaining a comprehensive suite of tools designed to facilitate informed investment choices. Additionally, Corey spends time researching, creating, and contributing to intellectual capital content pertaining to portfolio construction principles. Prior to joining the Portfolio Insights Program, Corey joined J.P. Morgan in 2009, where he managed a team of traders responsible for managing model-based portfolios.

Corey is a CFA® charterholder and a member of the CFA Society of Columbus, Ohio. He received a B.S. from the Fisher College of Business at The Ohio State University and holds the Series 7 and 63 licenses.

James Keenan '82

President

Walter & Keenan Wealth Management



For over 30 years, Jim has been a trusted partner in working with many high net worth investors and families in the region. From the most complicated estate planning projects to the most sophisticated investment strategies, Jim has always recognized that serving as an advisor in any capacity is first and foremost a privilege. The responsibility advisors are given to protect, preserve and grow client wealth is built on a foundation of trust built over time. Jim knows it is tremendously rewarding to help clients and families manage their financial lives. Jim and his team pledge to always act with integrity and honesty on behalf of their clients.

As one of the very first SEC-registered investment advisors in the area, Walter and Keenan was founded by Jim's uncle Donald Walter. Both Don and Jim are attorneys and have been very active in our client's wealth management, estate planning and asset transfer strategies. As a CFA and a member of the CFA Institute, Jim is a proud to associate with the most disciplined and prestigious group of trained investment professionals in the world.

Outside of the office, Jim has been very active and engaged in the non-profit community. He is President of the Judd Leighton Foundation which serves to perpetuate the legacy of his friend and mentor in our region in the areas of healthcare, education and economic development. He also serves as chair of the Beacon Health Foundation Investment Committee and as chair of the University of Notre Dame's Graduate Studies and Research Advisory Council.

Interests outside of the office include travel, biking, reading biographies, cross training, golf and college football. But most of all, Jim enjoys spending time with his family.

Sean Kelly

Vice Chairman

Rothschild Wealth Partners



Sean Kelly is Vice Chairman | Board of Directors of Rothschild Wealth Partners, where he plays a leadership role in strategic growth and business development initiatives.

He is a retired Managing Director of Morgan Stanley, where he spent more than 20 years in a variety of leadership and advisory roles across the firm's New York, Philadelphia, and Atlanta offices. While at Morgan Stanley, Sean co-founded and led a Private Wealth Advisor team that managed over \$2 billion in assets. In addition to his client advisory responsibilities, he served as the Mid-Atlantic and Southeast Regional Manager for the firm's Private Wealth Management division.

During his career, Sean was twice named to On Wall Street's "40 Under 40" and was consistently recognized on Barron's list of America's "Top Financial Advisors" for more than a decade. Earlier in his career, he was an Associate at Goldman Sachs and at Bank of America (formerly NationsBank).

Sean is a graduate and Trustee Emeritus of Queens University, where he also served as a Director of the University's Endowment. He holds an MBA from the University of North Carolina. He resides in Ponte Vedra Beach, Florida with his wife, Susan, and remains actively involved in his community, volunteering with the Boys & Girls Club of Northeast Florida, Ponte Vedra High School, and the Fitzgerald Institute for Real Estate at the University of Notre Dame. Sean and Susan are proud parents of JT Kelly, Notre Dame class of '26, and Katie Kelly, Dartmouth class of '29.

Mike LaMena '95

Chief Executive Officer
Wealthspire Advisors



Mike LaMena is the Chief Executive Officer of Wealthspire Advisors and brings nearly three decades of experience building, operating, and leading global wealth management organizations. Throughout his time at Wealthspire, Mike has helped grow the organization to over \$31 billion in AUM with 25 offices across the country and more than 375 employees. Prior to joining the firm, Mike spent seven years at HighTower, serving as President and Chief Operating Officer, playing an instrumental leadership role in scaling the business from a start-up organization to a nationally recognized financial services firm. He began his career in financial services with a 14-year tenure at Morgan Stanley & Co., where he served as Executive Director of Private Wealth Management Operations in New York, as well as Executive Director of Private Wealth Management for Asia in Hong Kong.

Mike is a frequent speaker at national industry conferences and has appeared on multiple podcasts, in videos, and in the media. In 2024, he was named “CEO of the Year” at the annual RIA Intel awards.

Mike is the host of Wealthspire Advisors’ podcast, Great Aspirations, which highlights stories of people who live life with purpose and the impact of deep, personal financial planning on their journey to fulfillment. He is also an outspoken advocate for education and served as a volunteer high school teacher at Mount St. Michael Academy in the Bronx, NY before starting his career in financial services.

Mike Landsberg '07

Senior Wealth Advisor, Shareholder
HB Wealth



Mike joined HB Wealth in early 2013 and is a Shareholder of the firm. He works with a wide range of high-net-worth clients, specializing in sophisticated investments, tax planning, estate planning, and philanthropy. He spent three years in investment management and tax planning at PricewaterhouseCoopers in Chicago, IL and then worked at a large multi-family office (MFO) based in Buckhead.

Mike received his B.A. in Accountancy from the University of Notre Dame and went on to earn a Master of Taxation from Arizona State University. He is a Certified Public Accountant (CPA), a CERTIFIED FINANCIAL PLANNER® practitioner, a Certified Private Wealth Advisor® designee, a Personal Financial Specialist (PFS™), and holds the Claritas Investment Certificate from the CFA Institute. Mike is also a 2020 graduate of the Schwab Executive Leadership Program.

Mike resides in Brookhaven, GA with his wife, Mina, and their sons, Oliver and Oscar. In his spare time, he enjoys golf, traveling, visiting with family, and watching Notre Dame football games.

Ryan Landsberg '10, '11 MSA

Partner

Plante Moran Financial Advisors



I specialize in providing holistic wealth management services to our clients. As a member of our ultra-high-net-worth practice, I act as our clients' personal CFO, coordinating and implementing investment management, income tax, estate tax, retirement, and education planning for individuals and families.

Before joining PMFA, I spent five years in Plante Moran's tax group with a focus on high-net-worth individuals, trusts, estate/gift tax planning, and compliance. My tax experience allows me to help clients with complex charitable planning, estate tax planning, and wealth transfer strategies.

I earned my B.B.A. and M.S. in accountancy from the University of Notre Dame. I grew up and spent the first part of my career in Metro Detroit; however, my wife and I relocated to Colorado in 2019. We've welcomed two daughters and a son since then. Outside of work, I stay active through golf, snowboarding, and chasing around our boxer, Jax.

Steve Leivent

Senior Vice President, Co-General Manager
SS&C Wealth & Investment Technologies



Steve Leivent is the SVP and Co-General Manager of SS&C Advent's Advisory business. In this role he is responsible for the business development of Black Diamond, a leading wealth platform and solution set for advisors, as well as SS&C's Advent Outsourcing Services business which provides cloud delivery of its award-winning portfolio accounting, reporting and order management products. He joined the firm in 2000, and has held various leadership roles during his tenure.

Steve holds a B.S. in Economics from Rowan University.

Andrew Lynch '13, '14 MSM

Senior Wealth Advisor
Walter & Keenan Wealth Management



Passionate about helping his clients live rich and meaningful lives, Andrew seeks to empower clients to make positive financial decisions that align with their unique values, goals, and objectives. Andrew has over 8 years of experience working to help high-net worth families and business owners manage their wealth and manage the unique and complex issues that frequently arise. Taking a holistic view of each client's circumstances, Andrew helps clients develop a comprehensive plan that forms the basis of their investment strategy. From there, he helps clients build portfolios that are rooted in sound financial principles, with a focus on tax efficiency and cost-effectiveness. Through it all, he enjoys building great relationships with his clients, and helping make complex financial topics easy to understand.

Prior to joining Walter and Keenan, Andrew spent eight years at a large national RIA, serving high net worth families and business owners. He also spent two years at a global consulting firm, where he assisted clients across a variety of industries with risk management and pre-IPO readiness activities.

When not “geeking out” over investment research, Andrew enjoys reading, cooking, watching old sit-coms (if Seinfeld is your definition of “old”), and spending time with his wife and three daughters.

Scott K. Martinsen '91 JD

Partner
Kembell, Woods & Martinsen



Scott represents clients in the preparation and administration of Wills, Revocable Trusts, Irrevocable Trusts, Business Entities, Durable Powers of Attorney, Living Wills and Charitable Organizations. The majority of his practice is focused on high net worth individuals and families with an emphasis on planning to minimize gift, estate and generation-skipping transfer taxes. Scott also represents individual and corporate trustees in litigation involving estates and trusts. He is a frequent author and lecturer on estate planning topics at seminars sponsored by ACTEC, The Missouri Bar, the University of Missouri-Columbia and the Kansas City Metropolitan Bar Association.

Jill Matesic '95

Family Office Strategist
Charles Schwab



Jill Matesic brings more than 25 years of financial services experience to her role at Schwab Advisor Family Office. She's had the pleasure of working with ultra-high-net-worth (UHNW) clients in various capacities over the course of her career. As a subject-matter expert and dedicated resource, she collaborates with clients to help them forge strong business models and develop best practices. Jill delivers resources beyond Schwab's high-touch family office platform, including on-demand expertise for complex needs, bespoke events, an extensive family office community, and curated content. She also has experience in business development, complex relationship management, comprehensive and creative problem-solving, and advising family offices and ultra-high-net-worth clients.

Prior to Schwab, Jill started her career as a business consultant at McKinsey & Co followed by heading up strategy for a start-up golf company, Natural Golf Corporation. After business school, Jill was a Vice President at Goldman Sachs, where she spent 10 years in Private Wealth Management out of the firm's Chicago office. She then went to work as Managing Director at O'Brien International, a single-family office, where she supported a wide range of priorities, including managing investments and evaluating their portfolio of businesses. Through this work, Jill grew her network in the family office community and realized the value of the independent advisory model. Ultimately, she decided to broaden her reach by helping advisors evolve their practices and that work is what drew her to Schwab.

Jill earned a Bachelor of Business Administration in Accounting from the University of Notre Dame and an MBA from Harvard Business School. She played soccer at Notre Dame, serving as team captain her senior year. Jill lives just outside of Chicago, is married to fellow Domer, Tim Gilroy, and is mother to 3 sports-obsessed sons.

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Vipin Mayar

Executive Vice President and Head, AI Innovation
Fidelity Investments



Vipin Mayar is the Executive VP and Head of AI Innovation at Fidelity Investments, a role he assumed in 2023. He previously served as Head of Customer Knowledge & Strategic Insights at Fidelity, leading a central team providing artificial intelligence solutions. Before re-joining Fidelity in 2011, Mayar was Global Head of McCann Worldgroup's Data and Analytics Practice. Before that, he was Senior VP of Market Research at Bank of America and VP of Sales and Marketing at Fidelity. Mayar earned an MBA in Finance and Marketing from Tulane University and a Bachelor's Degree in Chemical Engineering from the Indian Institutes of Technology, Delhi.

Patrick McCurry '98

Partner
McDermott, Will & Schulte



Patrick J. McCurry concentrates his practice on the corporate and tax aspects of complex business and investment transactions, with a particular focus on transactions involving single-family offices, private equity funds and other financial sponsors (on both buy and sell-side), emerging businesses, partnerships and strategic joint ventures, limited liability companies and closely held corporations.

Patrick has extensive experience in working with single-family offices in connection with the formation and/or restructuring of family offices and private trust companies, the creation of investment funds, the establishment of incentive equity programs for key employees and related income tax planning. He also routinely works on complex tax planning for high-net-worth individual and families, tax structuring healthcare services transactions and tax controversy matters.

Patrick is Co-Leader of the Firm's Closely Held and Passthroughs Affinity Group.

Ranked as "Band 1" by Chambers High Net Worth in its national Family Offices & Funds Restructuring category, clients praise Patrick for being "a lucid communicator, even of incredibly complex tax and legal concepts." Other clients note that Patrick "brings a level of knowledge and expertise in family office and partnership taxation" and he "never brings up an issue without thinking about multiple potential solutions."

While in law school, Patrick served as an extern for the Honorable Ronald A. Guzman, US District Court for the Northern District of Illinois. He also was a member of the Loyola University Chicago Law Journal.

Joe McLean

Managing Partner, Family Office
MAI Capital Management



Work Experience

- Provides planning and investment advisory services to professional athletes, entertainers, and entrepreneurs
- Prior to joining MAI in 2022, was a Managing Partner of Intersect Capital
- Clients include Academy Award winners, NFL and NBA World Champions, MLB All-Stars, and notable PGA golfers
- Known as the Money Whisperer in NBA circles, has played a leading role in high-profile deals including one of the largest shoe contracts in the NBA, the creation and launch of Slow Grind Media, and the establishment of leading wine brand Diamond & Key

Life Outside of MAI

- Serves on the board of trustees for the Special Olympics of Northern California, the Thompson Family Foundation, and the Gordon Family Giving Foundation

Education

- University of Arizona, MBA

Mike O'Grady '87

Chairman and Chief Executive Officer
Northern Trust



Michael O'Grady is Chairman and Chief Executive Officer of Northern Trust, a leading provider of wealth management, asset servicing, asset management and banking to corporations, institutions, affluent families and individuals.

Mike joined Northern Trust in 2011 from Bank of America Merrill Lynch, where he served as a managing director in the firm's Investment Banking Group. He joined Merrill Lynch in 1992. Prior to Merrill Lynch, Mike worked for Price Waterhouse.

Mike earned a bachelor's degree in business administration from the University of Notre Dame and an MBA from Harvard Graduate School of Business.

He is a member of the boards of the Field Museum, Museum of Contemporary Art Chicago, Catholic Extension and the Northwestern Medical Group Board of Directors. He also serves on the Finance Council of the Archdiocese of Chicago, the Board of Advisors of Catholic Charities, and the Civic Committee Commercial Club of Chicago.

Connor Smith '22

Client Associate
Rockefeller Capital Management



Connor joined the Moldaver Lee Cohen Wealth Partners within the Rockefeller Global Family Office in June 2022 after graduating from the University of Notre Dame with a Bachelor's Degree in Business Technology and a specialization in Information Technology, Analytics, and Operations. Aside from taking charge on the team's email, web, and social media marketing, Connor works with his team to focus on all levels of wealth management to offer the firm's clients specialized strategies for all asset classes, including cash, fixed income securities, equities, and alternative investments. He is committed to bringing a young, creative, and energetic approach to his clients now and in the future.

Connor previously spent the Summer of 2021 with Rockefeller Capital Management on the Northeast Operations team focusing on on-boarding, integration, and data analytics of Rockefeller's teams. Before Rockefeller, he worked with private equity firm Wellspring Capital Management where he conducted research, built LBO models, and assisted in preparing investment committee memorandums. Connor grew up in Northern New Jersey and currently lives in Manhattan. He is passionate about Notre Dame, water polo, music, podcasts and skiing.

Eryn Sporl

Head of University and Early Career Talent
Fidelity Investments



Eryn Sporl is the Head of University and Early Career Talent at Fidelity Investments, where she leads strategies to attract, develop, and retain emerging talent. With a passion for building inclusive programs and fostering career growth, Eryn drives initiatives that connect students and graduates to meaningful opportunities.

Prior to joining Fidelity, Eryn built a diverse career across multiple Human Resources and business disciplines within the telecommunications industry. Her experience spans talent acquisition, leadership development, HR business partnership, change management, mergers and acquisitions, learning and development, and consulting. This breadth of roles has equipped Eryn with a holistic understanding of organizational dynamics and the ability to design strategies that drive transformation at every level—from individuals to enterprise-wide initiatives. Her work has consistently focused on aligning people strategies with business goals, fostering resilience during change, and

creating environments where talent can thrive.

Eryn is passionate about serving diverse communities across the Dallas-Fort Worth area, focusing on initiatives that create opportunities and improve outcomes for under-resourced populations.

As a proud parent of four, Eryn draws inspiration from her family to fuel her commitment to education and empowerment. Her son, a sophomore at the University of Notre Dame, exemplifies these values as a student-athlete and campus leader. This personal connection reinforces Eryn's dedication to helping individuals reach their full potential—whether in their careers, education, or personal lives.

Eryn began her undergraduate studies at Vanderbilt University before completing her degree at Texas Christian University (TCU). She later earned her MBA from the University of Texas at Arlington.

Katie St. Onge '05, '06 MSA

Chief Operating Officer & Managing Director, Investor Solutions
Constellation Wealth Capital



Katie serves as the COO and Managing Director, Investor Solutions for CWC. Prior to joining CWC, she was a Principal at Comvest Partners, and before that a Senior Vice President at Crescent Capital Group. At both firms, she built out and managed teams focused on investor relations, client service, product management, and operations. Prior to Crescent, Katie was a Vice President at Goldman Sachs, most recently as a senior member of the Alternative Investment Client Services team. Katie began her professional career in the Private Client Advisors group at Deloitte.

Katie earned a Master of Science in Accountancy and a B.B.A. in Accountancy from the University of Notre Dame and an MBA from the University of Chicago Booth School of Business.

Cathy Stahl '92 SMC

Global Head of Marketing
PIMCO



Ms. Stahl is a managing director in the Newport Beach office. She is the global head of marketing; she co-leads, with the CTO, PIMCO's Global Digital effort; and she oversees PIMCO's philanthropy platform, Purpose at PIMCO. Prior to joining PIMCO in 2011, Ms. Stahl was a managing director and head of marketing at Allianz Global Investors Distributors. Before this, she held roles at Tiller, an advocacy marketing agency, and on the marketing team at OppenheimerFunds (since acquired by Invesco). Ms. Stahl serves as a board member of The PIMCO Foundation and St. Margaret's Episcopal School. She holds an undergraduate degree from Saint Mary's College, and she is co-author of "Twin Set," a nonfiction book about parenting twins.

Melissa Stolfi

Executive Vice President, Global Chief Operating Officer
TCW



Ms. Stolfi is the Chief Operating Officer for TCW. In this role, she supports the day-to-day operations of the investing businesses and helps lead strategic growth initiatives across the firm. Prior to TCW, Ms. Stolfi spent nearly 15 years at Goldman Sachs Asset Management where she was a Managing Director and most recently Chief Operating Officer and Head of Business Strategy of the \$300bn Public Equity business. Previously, Melissa held senior roles in the client portfolio management, portfolio construction and analytics teams at Goldman Sachs. She began her career as an analyst in the Securitization transactions practice at Deloitte. Passionate about women in investing, Melissa also served as a champion for the Girls Who Invest program at Goldman Sachs. Melissa earned a BS in Business Administration from Boston University and graduated from the Advanced Management Program at the Wharton School of the University of Pennsylvania.

Mark Tabit '82

Investor



With over 40 years of experience in the financial services industry, I've built strong relationships with many clients. Through these relationships, I've learned about their goals, challenges, and most importantly, their passions. For those who make it their business to help others and the organizations they serve, I'm proud that The Tabit Group has members with the CAP Chartered Advisor of Philtrampic and CFP designation. I graduated from the University of Notre Dame in 1982 with a degree in finance. I started my career as a financial advisor, not on prestigious Wall Street, but in a Sears Store on Main Street. I was part of the first group of test market advisors in the Sears store in Oakbrook, Illinois employed by Dean Witter. It wasn't glamorous but lead me down the path toward my future successes.

After the model closed, the firm of Prudential Bache offered me the opportunity to build a business and lead it. In 1991, I transitioned to role of manager. I was appointed the Oakbrook Complex Manager, and the following year, I became the Midwest Sales Manager, based in Chicago and covering an area from West Virginia, my home state, to Minnesota. Under my leadership that region grew substantially.

In 1996 an offer of my career presented itself. The role of complex manager and Southern California sales manager with Prudential Bache I grew Century City from #47 in three years to the #1 position in the firm. The Southern California region was also consistently the top sales and AUM region. An accomplishment I am very proud of have lead. In 2002, Wachovia acquired Prudential, and fate landed me not only my Prudential role but a larger role within Wachovia. Our complexes and regions consistently ranked #1. In 2008, the markets crashed, and Wachovia was in Financial Straights. Immediately, Merrill Lynch offered me the opportunity to build one of the firms's best practices, The Tabit Group, right in the heart of Beverly Hills, at the corner of Rodeo Drive and Wilshire.

Chris Toomey

Managing Director, Private Wealth Advisor
Morgan Stanley Private Wealth Management



A founding member of Team Global, Chris Toomey brings more than two decades of experience to the service of the team's clients. Chris focuses primarily on overseeing manager due diligence, asset allocation, and alternative investments. His work has garnered broad recognition, including being named to Morgan Stanley's exclusive President's Club and included on lists of America's top financial advisors by such prominent publications as Barron's, Forbes and the Financial Times. Chris is a regular guest on CNBC, FOX Business and Reuters, and has been invited to speak at SALT, HedgeWorld, the Investment Institute and other prestigious venues.

Prior to joining Morgan Stanley in 2008, Chris spent a decade at Lehman Brothers in a variety of increasingly responsible positions. Beginning as a Portfolio Manager, he became a senior member of the team that oversaw the firm's third-party, long-only manager platform. As Senior Vice President, he was responsible for manager due diligence and often assisted in providing asset allocation and investment advice for private wealth clients. Chris' began his career at JP Morgan's private bank.

Chris earned his B.S. in English with a minor in economics from Hamilton College. He enjoys Alpine skiing, tennis, sailing and working out on his Peloton.

Tony Xie '03

Director of Product Management, Wealth Management Solutions
Morningstar Investment Management



Tony Xie is a Director of Product Management at Morningstar, bringing over 20 years of leadership in the B2B wealth management technology space.

Throughout his career, Tony has specialized in developing software products and services for the US wealth management space with expert knowledge on investment research, portfolio management, financial planning, and reporting solutions. He has a proven track record of managing the entire product lifecycle, from initial concept and roadmap development to go-to-market strategy and execution.

Tony is a proud graduate of the University of Notre Dame, where he earned a Bachelor of Business Administration in Management Information Systems and was a member of the varsity swimming and diving team. He also holds an MBA from the University of Chicago Booth School of Business.

Tom Zidar '90

Chairman and Chief Executive Officer
Wintrust Wealth Management



Thomas P. Zidar began his tenure with Wintrust Wealth Management as Chairman and CEO in June 2006 and oversees five operating business units: Asset Management, Trust, Investments, 1031 Exchange, and Wintrust Private Client. He has an extensive financial services background, most recently serving as Executive Vice President, Personal Financial Services at ABN AMRO's LaSalle Bank. In this role, Tom headed five business units across the Midwest. During his tenure with ABN AMRO, he also served as Chairman, President, and CEO of ABN AMRO Financial Services; Senior Vice President, Integration Management; and Senior Vice President/First Vice President, Acquisitions & Corporate Capital. Prior to that, Tom held positions in management consulting in Chicago and investment banking in New York and London.

Tom received his BBA from the University of Notre Dame and his MBA from the J.L. Kellogg Graduate School of Management at Northwestern University. At Kellogg, he was an F.C. Austin Scholar and a Jim Packard Memorial Scholar. In addition, Tom has received Crain's Chicago Business "40 Under 40" award and Crain's Detroit Business "40 Under 40" award.

Tom is married and has four adult children. He and his wife are currently very involved in the Glenview, Illinois community, focusing on children's educational and athletic programs. Tom also serves on the board of Christ the King Jesuit College Preparatory School, Independent Mutual Fire Insurance Company, and Chicago Public Media Business Leadership Council.



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