Business Trends Summit

a part of Freeman Week

Friday, February 21, 2020

Elaine Langone Center (ELC), 2nd Floor

Innovation and Entrepreneurship

Bucknell
UNIVERSITY

Freeman
College of
Management

Attendees will discover the trends and opportunities in organizations from industry leaders in a variety of fields. Summit sessions are planned to foster networking among the attendees; all students, faculty and staff across the University are encouraged to attend.

Notes:

Summit Schedule

8:00-9:00AM Networking breakfast, ELC 276-Terrace Room

9:00-9:50AM Session 1

A: Transformation in the Pharmaceutical Industry, 241 Rooms A-D
Curt Cornwell ‘86, P’12, Partner, PWC

B: Private Equity from Start to Finish, Walls Lounge Room 213
Brad Langer ‘96, Managing Director, Brown Brothers Harriman & Co.
Mark Langer ‘02, Managing Director, Capital Partners
Laurie Schmidt ‘99, Partner, Goldman Sachs Merchant Banking

C: Innovations in Media, Center Room 256
Scott Collins P’23, Senior Advertising Sales Executive

10:00-10:50AM Session 2

A: Wealth Management and Entrepreneurship, Center Room 256
Emily Dafilou ‘16, Client Association, KORE Private Wealth
Jennie Sowers ‘98, Partner, KORE Private Wealth
Lucia Smircich ‘17, Client Associate, KORE Private Wealth

B: How Does Consulting Cultivate Innovation, Walls Lounge Room 213
Matt Gay ‘92, Senior Advertising & Marketing Director, Accenture
Amy LaRosa ‘90, P’21, Managing Director, Accenture
Alex Lord ‘18, Management Consulting Senior Analyst, Accenture Federal Services
Marissa Mancuso ‘18, Senior Analyst, Accenture
Brandon Neale ‘15, Management Consultant, Accenture

11:00-11:50AM Session 3

A: Tale of Two Buddies: Paths from the Big Four and Beyond, 241 Rooms A-D
Scott Feit ‘92, P'20, P'23, Principal, Prime Pensions
Mike Malin ‘92, Founder and President, Blue Marlin Enterprises

B: Financial Markets-Perspectives from the Front, Middle & Back Office, Walls Lounge 213
Steve Firestone ‘94, Lecturer & Former Lead, Office of the Comptroller of the Currency
Keith Grover ‘87, P’22, Director-Technology Services, BNY Mellon

12:00-1:30PM Concluding lunch with Keynote, MacDonald Commons
Keynote speaker:
Linda Avery ‘81, Chief Data and Analytics Officer and Senior Vice President, Verizon

Biographies

Scott Collins P'23
Senior Advertising Sales Executive

Most recent president of advertising sales for AMC Networks, Scott was responsible for overseeing the advertising sales efforts of the company's popular and award-winning national cable television networks AMC, IFC, SundanceTV, WE tv, and BBC AMERICA and BBC World News. He joined AMC Networks Advertising Sales in 2008 as SVP, Advertising Sales of WE tv. Prior to AMC Networks, Collins served as vice president of advertising sales for NBCUniversal Cable Entertainment. Prior to the NBC merger with Universal Television, Scott served as vice president of specials for both USA and Syfy representing miniseries and events such as Steven Spielberg's Taken and Mark Burnett's Eco Challenge. Earlier in his career, Scott worked at A&E Television Networks as an account executive for A&E and the History Channel. In 2011, he was named Sales Executive of the Year by CableFAX and was inducted into the CableFAX Sales Hall of Fame in 2012.

Curt Cornwell
Partner, PWC

Curt is a partner in the Deals / Transaction Services Group of PwC, where he leads the Sovereign Investment Fund practice in the US. He previously led the Private Equity Group in the Firm's New York office as well as the Divestiture Services practice. Curt's experience includes both financial and strategic buyers in public and non-public deals with deal sizes ranging from $50 million to in excess of $10 billion. He has over 24 years of transaction experience, assisting clients in analyzing and structuring over 225 deals.. Curt has an MBA in finance from Duke University's Fuqua School of Business and a BS in accounting from Bucknell University. He is also a Trustee of McDonogh School, a Certified Public Accountant and member of the AICPA.

Emily Dafilou '16
Client Associate, KORE Private Wealth

Emily joined our team immediately after college, instantaneously impacting our lives and those of our clients. Her first and most surprising influence on her colleagues was discovered at a restaurant. We never expected this unassuming and jovial colleague would have such a strong passion for trying new things – especially food – a trait that would become symbolic to her role within the group. Emily has never encountered a task or a project that has daunted her. While to many of us her missions to deliver the highest client service seem insurmountable, she always delivers with a smile and a funny anecdote along the way. As a pivotal member of our Client Service team, Emily spends her time on myriad activities ranging from daily transactions to preparing client review meetings. She strives to deliver tailored service to clients with a simple tenet of looking deeply at how to make their lives easier.

Scott M. Feit '92, P'20 '23

Principal, Prime Pensions

Scott, a Principal of Prime Pensions, Inc., has over 20 years of experience as a pension consultant, designing, implementing and administering thousands of corporate retirement plans. Scott is a member of the American Society of Pension Professionals & Actuaries (ASPPA), he is a Certified Pension Consultant (CPC), Qualified Pension Administrator (QPA) and a Qualified 401(k) Administrator (QKA). Scott is also an Enrolled Retirement Plan Agent (ERPA). As an Enrolled Retirement Plan Agent, Scott is allowed to represent companies before the Internal Revenue Service on retirement plan matters. Scott has written and published an article for the New York State Society of CPAs, "Should a 401(k) Plan Be a Safe Harbor 401(k) Plan?" (The CPA Journal) – Google "Scott M. Feit" for a copy of the article. Scott has lectured extensively on 401(k), profit sharing and pension plans. Scott graduated Bucknell University in 1992 with a degree in accounting. Scott worked at Arthur Andersen from 1992 to 1996. His specialty was forensic accounting.

Steve Firestone '94

Lecturer & Former Lead, Office of the Comptroller of the Currency
Adjunct Professor, Drew University

Steve is presently an Adjunct Professor of Finance at Drew University where he teaches graduate courses in financial risk management and behavioral finance. Prior to that, Steve served for over seven years as a U.S. Treasury Department official in The Office of The Comptroller of the Currency, providing effective oversight of trading and lending activities at some of the world's largest banks. His tenure in government service followed a twenty year career in the financial markets as a fixed income trader, portfolio manager, and investment banker. Steve has directly managed multi-billion dollar portfolios of structured products, leveraged loans, and credit derivatives at Teacher Retirement System of Texas and CIBC World Markets, respectively. For a number of years Steve has also been committed to public service, serving on the Zoning Board of Adjustment in Hoboken, N.J. and serving as both a Planning Commissioner and Zoning Board Member in Charlotte, N.C. He received a B.A. in economics from Bucknell University, an M.B.A in finance and public policy from Indiana University-Bloomington, and is in the process of completing a Ph.D. from University of North Carolina at Charlotte, focusing on real estate economics. He also completed his Chartered Alternative Investment Analyst (CAIA) designation in 2009 and is active in the CAIA Association. Steve has also raced in two TCS New York City Marathons and plans to complete his third this November.

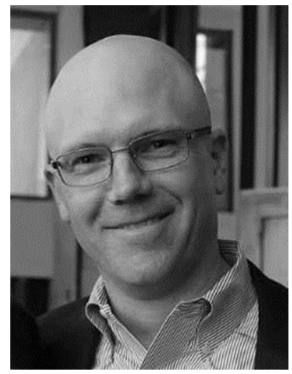
Matt Gay '92

Senior Advertising & Marketing Director, Accenture

Matt Gay is a Senior Advertising & Marketing Director in Accenture's Communications, Media, & Technology practice with experience marrying technology with strategic business and operations expertise. He most recently brought automation to and defined programmatic strategy for the buying and selling of media. Matt holds a Bachelor's Degree from Bucknell in engineering.

Keith Grover '87, P'22

Director-Technology Services, BNY Mellon



Keith Grover is a Director in the Technology Services Group at Bank of New York Mellon in NYC where he is responsible for Finance and Business Management with focus on Strategic Business Planning, Expense Management and 3rd Party Vendor Financials. Prior to his current role Keith was CFO and Vice President at Goldman Sachs Group where he managed the Finance and Business Management functions for the Global Platform Engineering Organization. During his 26-year tenure at Goldman Sachs he held various positions within Controllers and Technology responsible for managing $1.2B in Communications and Technology spend including staff, capital, and operating expense. He has experience as Global Controller and CFO for Infrastructure, Technology Risk (Cybersecurity) and Client Platforms organizations. He interfaces regularly with internal and external clients of the bank and has advised on acquisitions and divestitures as well as monetization of internally developed software platforms. Keith holds an MBA in Finance and International Business from Rutgers Business School and a BA in Economics and Political Science from Bucknell University. He lives in New Jersey with his wife Michele and has two adult sons Andrew and Luke.

Brad Langer '96

Managing Director and Co-Manager, Brown Brothers Harriman & Co

Brad is a Managing Director of Brown Brothers Harriman & Co. (BBH) and the Co-Manager of BBH Capital Partners, the Private Equity division of BBH. He has 21 years of private equity investment experience. Within BBH Capital Partners, Brad focuses on investing activities, including deal sourcing, investment evaluation, transaction execution and providing post-investment value-added oversight to portfolio companies. Brad is either a director or observer on the board of directors of Noble Systems Corp., Microban International, Ltd., KabaFusion Holdings, LLC, PrimeRevenue, Inc., Haven Behavioral Healthcare, Ethos Veterinary and American Physician Partners. Brad sits on the Investment Committee of BBH Capital Partners and the Diversity and Inclusion Committee of BBH's Private Banking division. Prior to joining BBH, he was actively involved in evaluating and managing mezzanine investments at Whitney & Co. and Paribas Capital Funding. Mr. Langer graduated from Bucknell University with a B.S.B.A. in accounting and finance.

Mark Langer '02

Managing Director, Capital Partners

Mark graduated from Bucknell University in 2002 with a BSBA in management. He subsequently received an M.B.A. from Columbia University Graduate School of Business in 2010. Mark has over 16 years of private equity and investment banking experience and joined his current firm Capital Partners in 2012. Capital Partners is a Connecticut-based lower middle market private equity firm with approximately $1 billion of assets under management. The firm focuses primarily on manufacturers, value-added distributors and business service companies that are domiciled in the United States. He currently serves on the board of directors of five portfolio companies, including four as the Chairman of the Board. In addition to board work, he also spends his time evaluating and executing new transaction opportunities. Prior to joining Capital Partners in 2012, he spent six years working as an investment professional at The Compass Group, a private equity firm based in Westport, CT. Prior to Compass, Mark worked as an Associate at Green Manning & Bunch, a boutique investment banking firm in Denver, CO.

Amy LaRosa '90, P'21

Managing Director, Accenture

Amy LaRosa is a Managing Director for Accenture's Communications, Media & Technology North America practice. Amy has sold and delivered transformational business process outsourcing and consulting programs to many clients. Amy is a founding member of the CMT North America Innovation Center team where she has provided strategic and managerial direction since 2000. She has led Centers of Excellence in the areas of User Experience, Technology Innovation, Mobility and Internet Strategy. Amy holds a Bachelor of Arts degree in Economics and a minor in French from Bucknell University. She is currently the President of the Bucknell Professional Network.

Alex Lord '18

Senior Analyst, Accenture

Alex Lord is a Senior Analyst at Accenture working on a major shipping & logistics route optimization project. Through this project, Alex has gained experience in Agile, NextGen communications, and process optimization. Alex graduated from the Freeman College of Management in 2018 majoring in Global Management and Spanish. He also served as an inaugural member of the Freeman College of Management Student Advisory Board.

Michael Malin ‘92

Founder and President, Blue Marlin Enterprises

Michael Malin is founder and president of Malin Consulting, a company that provides business advisory services and real estate development opportunities. He serves on three board of advisors lending his expertise in reviewing business plans, financial models, marketing strategy, and resource needs. Michael honed his expertise in the cybersecurity industry as a co-founder and CFO for Mandiant Corporation, a computer security services and software company where he built the company to position it for a successful acquisition. Prior to co-founding Mandiant, Michael was the regional VP, International Business for Foundstone Inc., where he was instrumental in driving business growth and expansion initiatives for this computer security company. He also served as a manager at PricewaterhouseCoopers LLP.

Marissa Mancuso ‘18

Senior Analyst, Accenture

Marissa is a Senior Analyst at Accenture and is working on deploying a new Client Data Protection Program across all of Accenture Federal Services. By playing a role in developing this new program, she has gained experience in process design, Agile, design thinking, and Salesforce. Marissa was a member of the Freeman College of Management's inaugural graduating class in 2018, receiving a Bachelor of Science in Business Administration degree and majoring in Managing for Sustainability.

Brandon Neale ‘15

Consultant, Accenture

Brandon is a consultant in Accenture’s Customer Insight & Growth practice. He has delivered customer strategy across high-tech, biotech, telecom, and logistics clients with a focus on B2B customer experience, the recurring revenue model, experience design, and market strategy. Brandon is certified in Agile, Design-Thinking, and Leading with Finance. Brandon graduated from Bucknell with a double major in Political Science and Anthropology, and a minor in Spanish.

Laurie E. Schmidt '99

Chief Financial Officer, Merchant Banking, Goldman Sachs

Laurie is chief financial officer for the Merchant Banking Division (MBD) with global oversight of all financial and risk management operations of the division and its alternative investment funds. She works closely with MBD leadership to develop and execute strategic initiatives. Previously, Laurie was head of investor reporting and fund management for MBD's private equity, credit, real estate and infrastructure funds. She joined Goldman Sachs as an associate in 2003, and was named managing director in 2010 and partner in 2018. Prior to joining the firm, Laurie worked in Transaction Services at PricewaterhouseCoopers. Laurie earned a BS in Business Administration, cum laude, from Bucknell University in 1999.

Lucia Smircich '17

Client Associate, KORE Private Wealth

Lucia graduated from Bucknell University in 2017. Immediately after graduation, Lucia worked for MarketAxess for a year. Having interned for KORE Private Wealth for several summers, Lucia made a move to join KORE as Client Associate. A great athlete in school, Lucia showed her team orientation and leadership skills when she was named captain of the Bucknell lacrosse team two years in a row. She carries her enthusiasm and thirst for knowledge to her role at KORE where she helps clients tackle the varied challenges that present themselves each day. Lucia greatly values KORE's approach of looking holistically at an individual's financial and lifestyle goals to help make them a reality. KORE's comprehensive service mirrors how she views her own life – making decisions always considering her family, friends and in the end, herself.

Jennie Sowers '98

Partner, KORE Private Wealth

Jennie's journey in the financial services industry began in 1998 at Paine Webber (then UBS). Over this past two decades, her roles and areas of focus transitioned from highly technical and market-oriented areas, to relationship and business management for our team, which she joined in 2002. Several years ago, prior to KORE's launch, Jennie began transitioning her role away from being a co-portfolio manager across over $2billion+ of municipal bonds and began concentrating exclusively on building the broader business and client relationships, especially supporting female clients to empower them in their financial lives. This has meshed well with many of Jennie's personal commitments, activities and leadership within various elements of her community ranging from her church's endowment committee, to her children's school, to organizing a working-women Paddle league. In addition, Jennie has been asked to sit on the CAIS Alternative Investments Advisory Council.

Summit Concluding Luncheon with Keynote Speaker

Linda Avery '81
Chief Data and Analytics Officer &
Senior Vice President
Verizon

Linda is the strategic voice and visionary for data and analytics at Verizon, focused on making Verizon an AI powerhouse. Linda joined Verizon in September 2019. Prior to this role, Linda was the first Chief Data Officer at the Federal Reserve Bank of New York. She shaped the central bank's data strategy, establishing a new Data Science organization from the ground up, and cultivating the use of AI by economists and central bankers in monetary and supervisory policy and research. Additionally, Linda both transformed and led the Federal Reserve function that is responsible for the collection and data quality assurance of the complex data sets received from the world's largest financial institutions, which play a mission-critical role in the work and decisions of the Federal Reserve System and the Treasury. Previously, Linda had a 20 year career at Goldman Sachs, where she was a Managing Director of Technology. She held a diverse set of global leadership roles driving business transformation and innovation across the Trading, Investment Banking, and Operations, Technology, and Finance Divisions. Linda also led the establishment of several start up joint ventures for Goldman Sachs. She was co-chair of Women in Technology and was a key sponsor of Goldman's engagement with Girls Who Code. In April 2019, Linda was awarded the honor of "U.S. Chief Data Officer of the Year" by the CDO Club. Linda earned her Bachelor's Degree in English from Bucknell University in 1981. She is married with one daughter, and lives in Summit NJ. She enjoys sailing out of New York Harbor.