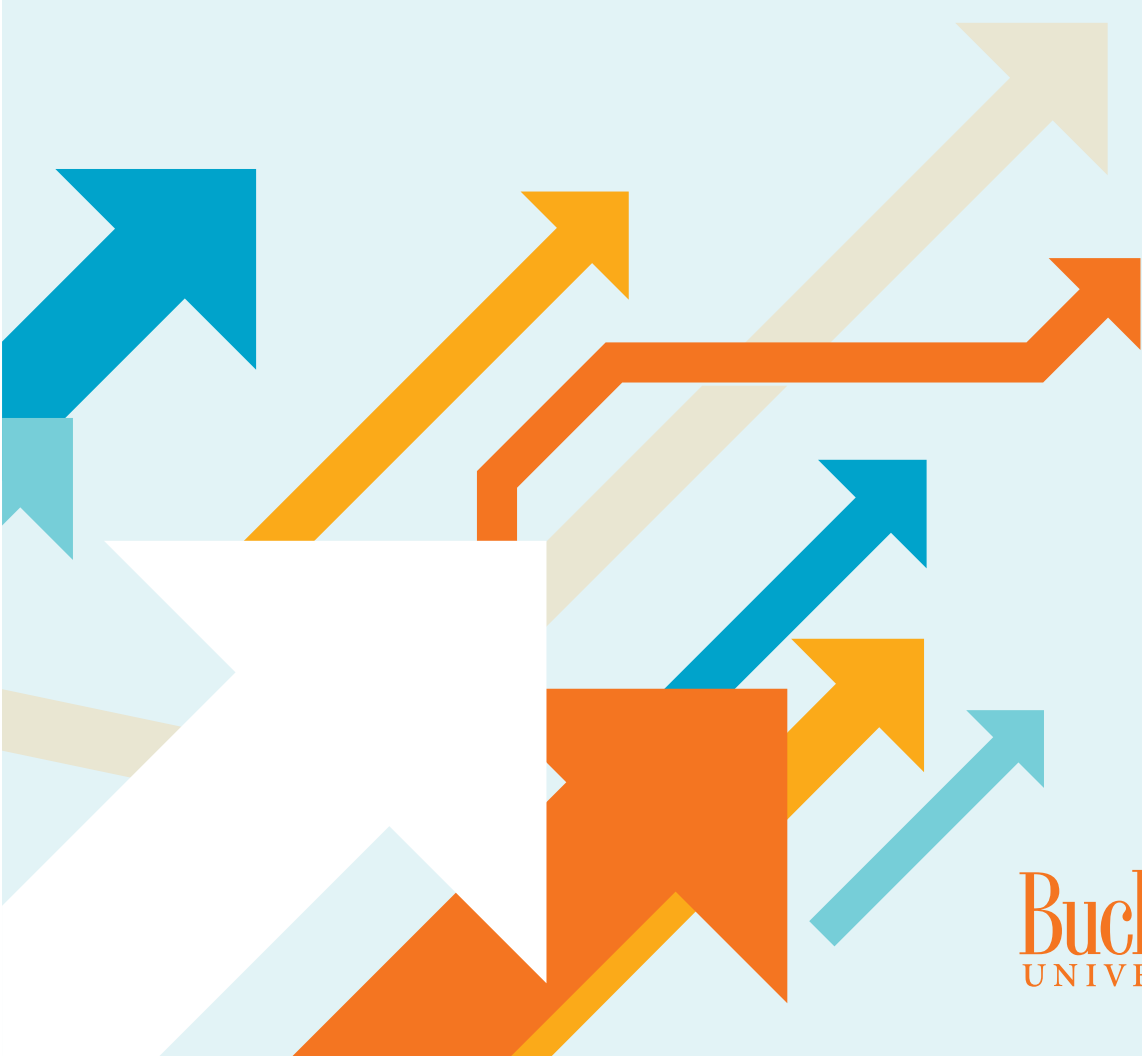


BUSINESS TRENDS SUMMIT 2022



BUSINESS TRENDS SUMMIT

Part of Freeman Week

April 8, 2022

Attendees will discover the trends and opportunities in organizations from industry leaders in a variety of fields. All students, faculty, and staff across the University are encouraged to attend.

8 - 9 a.m.
NETWORKING BREAKFAST
Holmes Hall Lobby

8:30 a.m.
**TWILIO CHALLENGE
WINNERS ANNOUNCED**
Holmes Hall Lobby

ALYSON WELCH '96
Vice President, North America Enterprise with Twilio will announce the winners of this challenge competition where student teams created a solution to a community issue.

9 - 11:50 a.m.
CONCURRENT SESSIONS
[Details on following pages](#)

12 - 1 p.m.
CONCLUDING LUNCH
Holmes Hall Lobby

SESSIONS

9 - 9:50 a.m. | SESSION 1

A: UNDERSTANDING REAL ESTATE & PRIVATE EQUITY TODAY

Holmes Hall 104

BRIAN KENNEDY '08
Principal, Axonic Properties LLC

JONATHAN SHECHTMAN '07
Managing Principal, Axonic Properties LLC

B: FINANCE CAREER PERSPECTIVES

Holmes Hall 116

BRAD LANGER '96, P'26
Managing Director, Brown Brothers Harriman & Co

ROBIN SUSKIND '94
Managing Director, KBW, a Stifel Company

C: SUPPLY CHAIN: CHALLENGES & CHANGES

Holmes Hall 202

PAUL RIDDER '93, P'24
Regional Vice President, Flowers Foods;
President, Tasty Baking Company

PAUL STURMAN '83, M'84, P'26
Executive Advisor, KKR & Co. Inc., Former CEO of Bountiful Company

10 - 10:50 a.m. | SESSION 2

A: HOW WALL STREET ESG DATA IS REVOLUTIONIZING MAIN STREET

Holmes Hall 116

ANDY BURR '04
CEO and CoFounder, encountabl

JUSTIN VIEIRA '04
Executive Director, Situational Analytics S&P Global

B: CHANGE LEADERSHIP

Holmes Hall 341

JIM HOWLAND '82, P'19
Managing Director, Morgan Stanley Private Equity

TODD SINGLETON '88
Senior Managing Director, Accenture

C: REAL ESTATE DEVELOPMENT & ACQUISITION

Holmes Hall 104

BLAKE SILVERMAN '05
President, The Silverman Group

11 - 11:50 a.m. | SESSION 3

A: THE ART OF THE DEAL

Holmes Hall 116

ERIC RODDY '98
Managing Director & Partner, William Blair

SUSAN RODDY '98
Managing Director, Health & Beauty Investment Banking, Houlihan Lokey

B: THE FUTURE OF WORK- MAKING HYBRID MODELS WORK

Holmes Hall 102

DAVE SHARPE P'24
Partner, PwC

BIOGRAPHIES *(in order of panel)*

2022 WALLING LECTURER



ALYSON WELCH '96
Vice President Enterprise General Business, Twilio

Alyson Welch is the Vice President of Twilio's Enterprise General Business. An expert in organizational planning, she has built enterprise sales capabilities from the ground up for Fortune 1000 companies and early-stage startups. Throughout her career, she's excelled in scaling go-to-market engines and has successfully designed and executed turnaround strategies for large revenue divisions with more than \$500 million in annual recurring revenue. Alyson attended Bucknell, graduating with a double major in Economics and French.

Alyson is passionate about mentorship; in her free time, she helps tomorrow's brightest leaders develop their skills and figure out how to advance their companies' revenue generation strategies.



BRIAN KENNEDY '08
Principal, Axonic Properties LLC

Brian Kennedy is a Principal of Axonic Properties, a private equity real estate fund manager with a focus on residential real estate investment in Florida. Brian leads the investment selection of each fund and oversees all financial aspects of the firm. He is responsible for sourcing new opportunities and the execution of financing for each asset. Brian created the firm's underwriting processes which are designed specifically to identify underperforming and mispriced properties. He has also implemented performance tracking metrics to maximize the returns of each fund. Brian graduated from Bucknell University with a B.S. in Economics and holds an M.S. in Accounting from the University of Tampa.



JONATHAN SHECHTMAN '07
Managing Principal, Axonic Properties LLC

Jonathan Shechtman is the managing principal and founder of Axonic Properties where he has led six private equity funds focused on buying residential properties in Florida. Jonathan is responsible for identifying business opportunities and is an expert in distressed real estate repositioning. The firm has acquired over \$800 million of assets in Florida and approximately 7,000 apartment, condominium, and single-family homes in its 10-year history. Prior to joining Axonic in 2012, he cofounded two distressed real estate funds with Matthew Pikus '07 in Naples Florida. Jonathan graduated from Bucknell University with a B.S. in business management.



BRAD LANGER '96, P'26

Managing Director, Brown Brothers Harriman & Co

Brad Langer is the Co-Manager of Brown Brothers Harriman Capital Partners (BBH Capital Partners), the private equity investment division of Brown Brothers Harriman & Co. (BBH) and a Managing Director of BBH.

Brad shares day-to-day management responsibility for BBHCP. Brad focuses on BBHCP investing activities, including deal sourcing, investment evaluation, transaction execution and providing post-investment oversight to portfolio companies. Prior to joining BBH in 2001, Brad was actively involved in evaluating and managing private equity and private debt investments at Whitney & Co. and Paribas Capital Funding.

Brad is either a director or observer on the board of directors of PrimeRevenue, Haven Behavioral Healthcare, Ethos Veterinary, American Physician Partners, Clever Devices, DynaGrid, American Spraytech, GIFTED Healthcare and The Granite Group. Brad sits on the Private Banking Diversity and Inclusion Council of BBH. Brad is a 1996 graduate of Bucknell University.



ROBIN POLINER SUSKIND '94

Managing Director, KBW, a Stifel Company

Robin is a Managing Director in the FIG depositories investment banking group and co-head of the Mutual Bank Conversion Group. Robin joined KBW in 2012 when it was acquired by Stifel. Previously, she was a Managing Director at Stifel and earlier in her career worked at Ryan Beck until it was also acquired by Stifel. Robin has over 25 years of experience working with community banks throughout the country but primarily focusing on banks in the northeast and mid-atlantic regions of the United States. She helps her clients with equity and debt capital raising transactions, M&A and strategic advisory. As the co-head of the mutual conversion group, she has raised over \$22 billion in equity for over 200 mutual savings banks in the US and has led all of the largest transactions. Ms. Suskind was selected as one of Investment Dealers' Digest's "Top 40 Under 40" in 2006.

Robin is a senior leadership member of the Stifel Women's Initiative Network (WIN) for Stifel's Institutional Group. WIN is designed to engage, equip, and empower women throughout the firm to recognize their value, set goals, and reach their potential in both their personal and professional lives.

Robin is also a member of the Board of Directors of Somerset Savings Bank. The Bank is headquartered in Bound Brook, New Jersey. Somerset Savings Bank is a mutual savings bank in central NJ that focuses on serving the needs of its customers and the communities where they live.

Robin is a graduate of Bucknell University with a degree in Business Administration. She resides in New Jersey with her husband, Jay, and three children.



PAUL RIDDER '93, P'24

Regional Vice President, Flowers Foods; President, Tasty Baking Company

Paul D. Ridder became the President of Tasty Baking Company in May 2011. In November of 2017, Paul was appointed Regional Vice President, Flowers Foods. Prior to 2011, he was Tasty Baking Company's Senior Vice President and Chief Financial Officer. In his role as President, Paul is responsible for all aspects of the operations of Tasty Baking Company, including leveraging the merger with Flowers Foods to expand Tastykake into a national brand, as well as to deliver new and innovative products. During Paul's tenure as President, the reach of the Tastykake brand has more than doubled and now reaches 75% of the U.S. Population.

As an active member of the community, Paul lends his expertise to various organizations. Currently, he serves on the CHOP Corporate Council, as well as the Chamber of Commerce for Greater Philadelphia and the Philadelphia Zoo. Paul's past affiliations include serving on the board of Cabrini College Board of Trustees, Big Brothers Big Sisters Independence Region, the Moyer Foundation, the Police Athletic League of Philadelphia, Villanova University - Dean's Advisory Council, as well as the Allegheny West Foundation, a nationally recognized community development corporation actively involved in the revitalization of North Philadelphia's Allegheny West neighborhood.



PAUL STURMAN '83, M'84, P'26

Executive Advisor, KKR & Co. Inc. Former CEO of Bountiful Company

Paul Sturman is an authentic, global leader with 35+ years of success in consumer-driven businesses. He is a results-driven change agent with a track record of turning businesses around, creating and sustaining conditions for meaningful innovation, and transforming organizations organically and through mergers and/or acquisitions.

He has helped build some of the world's most well-known brands including Nature's Bounty, Advil, Chapstick, Band-Aid, Listerine, Trident, and Halls. Paul attracts and inspires diverse teams to produce superior results through insight, strategic vision, transparency, inclusion, cross-functional integration, and efficient leverage of key cost drivers.



ANDY BURR '04

CEO and CoFounder, encountabl

Andy Burr '04 has worked for more than a decade at the intersection of technology, business, and policymaking. He is the CEO and Co-Founder of Ecountabl, the groundbreaking startup that enables people to bank and shop with their values. He held multiple roles at the U.S. Department of Energy from 2014-2019, serving as an urban affairs advisor in the Office of Energy Efficiency and Renewable Energy and as lead policy advisor for the Building Technologies Office.

Prior to public service, Andy co-directed a \$20 million special climate project in partnership with U.S. mayors and Bloomberg Philanthropies. His career in corporate marketing at CoStar Group (NASDAQ: CSGP), a global real estate technology company. He has advised major U.S. presidential campaigns on climate initiatives and spoken internationally on American real estate climate policy at events hosted by the European Commission Joint Research Centre in Frankfurt and the China Ministry of Housing and Urban-Rural Development in Beijing.

**JUSTIN VIEIRA '04**

Executive Director, Situational Analytics, S&P Global

Justin Vieira '04 is an Executive Director on S&P's Situational Analytics Team and advises global issuers on shareholder engagement around strategic initiatives involving spinoffs, M&A, capital allocation and ESG Shareholder Engagement. Previously, Justin led IHS Markit's Shareholder Intelligence & Data Operations and was Site Lead of the Cape Town South Africa office. Justin began his career advising Investment Banking clients on matters including deal/non-deal roadshows and new issuance analytics before starting the Corporate Analytics Group at Ipreo.

**JIM HOWLAND '82, P'19**

Managing Director, Morgan Stanley Private Equity

Jim Howland is a Managing Director, Head of Portfolio Operations, and Co-Head of Business Services and Education investing for Morgan Stanley Capital Partners, based in New York. Jim joined Morgan Stanley in 2008 and serves as Chairman of the Board of World 50, Clarity Software, Educate 360, 24 Seven Talent Staffing, Sila HVAC Services, and Smile America Partners. He previously served as Chairman of the Board of EmployBridge, CoAdvantage, Access Cash, Cadence Education, and Learning Care Group and as Director of Zenith.

Prior to joining Morgan Stanley, Jim was President of Dun & Bradstreet's International Business and was CEO of two high-growth businesses: Edison Schools - Educational Services Group and Regus Business Centers, Americas. Earlier in his career, he held a number of senior line positions at American Express, including serving as President of their International Merchant Services business based out of London. Prior to joining American Express, Jim held a senior role with McKinsey & Company in their Financial Services practice.

Jim holds a B.A. in Economics, magna cum laude, from Bucknell University ('82) and an MBA from the Stanford University Graduate School of Business ('86). Both his daughter Jenn ('19) and brother Tom ('91) are Bucknell graduates. Jim serves as a Board Officer and Advancement Head for the Port Chester Carver Center, a community center providing after-school programs, food security, citizenship, and other social services to a high-need, at-risk community. He is also active in the Westchester/Fairfield County chapter of YPO (Young Presidents Organization), and serves on the Advisory Board for Bucknell's Freeman College of Management.

**TODD SINGLETON '88**

Senior Managing Director, Accenture

Todd Singleton is a Senior Managing Director with Accenture based in Washington DC. Todd joined Arthur Andersen & Co., the origin company that later became Andersen Consulting then Accenture, in 1988. He has served clients across the United States and internationally primarily in the Public Service and Health Care sectors. Todd has held leadership positions at Accenture since 2004, is a member of the company's Global Leadership Council since 2011, and currently serves as the Managing Director of Sales for the South Market Unit of the United States.

Todd holds a B.S. in Management Administration, Magna Cum Laude, from Bucknell University. Todd's sister Tammy Singleton-English ('85) and nephew Andrew English ('15) are also Bucknell graduates. Todd and his wife Lisa Mascolo actively support organizations that serve children with disabilities, cancer research, and military and veterans advocacy, and serve on Boards of healthcare and higher education institutions including Todd's service to the Advisory Board of Bucknell's Freeman College of Management. Todd and Lisa live in the Lowcountry outside of Charleston, SC where they enjoy nature, good weather, weekly visits with their nearby son and daughter-in-law, and shortly will welcome Lisa's mother into their expanded home.

**BLAKE SILVERMAN '05**

President, The Silverman Group

Along with his father Ken, Blake founded The Silverman Group, a real estate development and private equity firm in 2007 and as President runs all facets of the day to day business operations. Today, their business is focused on the development and acquisition of commercial real estate nationwide. In addition, through one of their divisions, SLI Investment Partners, invests in early stage business opportunities. Under its newest subsidiary based in Charlotte North Carolina, SL Management Group Southeast LLC, The Silverman Group will be able to self-perform their own general contracting. The real estate portfolio has grown to over 25,000,000 square feet of predominately industrial properties, as well as 4,000 multi-family units throughout the United States. Through its management entities, SL Management Group and C&R Property Management, the portfolio is actively managed on a daily basis. Currently, there are ongoing development projects of over 15 million square feet of industrial space and 2,000 multi-family units in seven states.

Prior to the Silverman Group, Blake worked for his father as the Director of Business Development at Silver Line Building Products Corporation. Silver Line was the largest manufacturer of vinyl windows and doors in the United States and was sold to Andersen Windows in 2006.

Blake is a graduate of Bucknell University and currently sits on its Real Estate advisory board and advisory board of the Freeman College of Management. He also sits on the Board of Trustees at The Willow School and the board of Gotham Greens, a worldwide pioneer in the field of urban agriculture and a leading regional producer of hyper-local, premium-quality, greenhouse grown vegetables and herbs.

**SUSAN RODDY '98**

Managing Director, Health & Beauty Investment Banking, Houlihan Lokey

Ms. Roddy is a Managing Director in Houlihan Lokey's Consumer, Food & Retail Group, leading the firm's Consumer Health and Beauty practice. Her focus areas include health & wellness and beauty & personal care, including women's health and mom & baby. She is based in the firm's New York office.

Ms. Roddy has nearly two decades of corporate finance experience, with a particular passion for advising high-growth consumer brands. Her recent work includes the sales of Zesty Paws to H&H Group, Nuun to Nestlé Health Science, SmartyPants to Unilever, Care/of to Bayer, and Zarbee's to Johnson & Johnson. She also has significant expertise in corporate carve-outs and divestitures, as well as contract manufacturing and private label across sectors.

Before joining Houlihan Lokey, Ms. Roddy worked in Corporate Strategy & Development at PepsiCo, where she led deal execution in Europe and was responsible for executing the company's strategy to expand into good-for-you and better-for-you food & beverage categories. Prior to that, she worked in Investment Banking for Deutsche Bank and as an accountant for Ernst & Young.

Ms. Roddy holds a B.S. in Accounting from Bucknell University and an MBA from the Darden School at the University of Virginia. She was previously a Certified Public Accountant in the state of Pennsylvania.



ERIC RODDY '98
Managing Director & Partner, William Blair

Eric Roddy is a Partner, Managing Director and Head of SPAC Coverage and Advisory for William Blair. He is responsible for advising companies seeking to access the public markets via SPAC business combination, and advising William Blair's SPAC and corporate clients on transaction structuring and deal marketing. Previously, Eric was a Managing Director at Nomura Securities covering the leisure sector and based in New York.

Mr. Roddy has additional experiences from Macquarie Capital, where he was a Senior Vice President on its Consumer & Retail team, and Centerstone Partners, where he also acted as Chief Executive Officer for one of their portfolio companies, Brightbridge Solar. Eric began his career at Deutsche Bank, where he spent eleven years in the Equity Capital Markets and Global Consumer groups. Eric earned his Bachelor of Science in Business Administration from Bucknell University, where he was an Accounting major.



DAVE SHARPE P'24
Partner, PwC

Dave brings more than 35 years of experience working with the executive management and boards of Fortune 500 companies, including Fortune 25 companies, as well as private equity funds and portfolio companies in the consumer markets sector as they navigated strategic, transformational and operational issues.

He has deep experience with financial reporting and internal control matters, SEC and PCAOB regulatory, and board governance matters. Dave has lived and worked in Europe, gained experience in emerging markets, and has coached and developed many individuals and teams as well as sponsored candidates for partnership. As National Auditing Services, Methodology & Tools Design & Delivery Leader, Dave co-hosts a webcast series for PwC's audit practice and leads a team that provides methodology policy and guidance support. He earned a BS from the University of Scranton.

NOTES

Presented by the Center for Experiential Learning, Freeman College of Management.

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