

BUSINESS TRENDS SUMMIT 2025

Presented by
Experiential Learning »
Freeman College
of Management



A CELEBRATION OF MANAGEMENT AT BUCKNELL UNIVERSITY

FREEMAN WEEK

BUSINESS TRENDS SUMMIT

Part of Freeman Week | April 11, 2025

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

9 - 9:45 a.m.
CONCURRENT SESSION 1

A: HARNESSING AI: SMART GOVERNANCE AND IMPLEMENTATION

Holmes 129

Sudhir Kondisetty '90, Principal, National Technology Risk Consulting Leader, RSM

Lea Walsh '20, Supervisor, Management Consulting, RSM

B: DECODING THE CONSUMER: UNDERSTANDING DATA IN THE DIGITAL AGE

Holmes 202

Elise Perazzini '15, Consumer Data Strategy Lead, L'Oreal USA

C: LEADERSHIP IN A RAPIDLY CHANGING WORLD

Holmes 116

Ken Freeman '72, Business Executive and Academic Leader
Interviewed by Freeman College of Management Dean, Michelle Roehm

10 - 10:45 a.m.
CONCURRENT SESSION 2

A: INFORMATION AS A SECOND LANGUAGE: THE PEOPLE - DATA CONNECTION

Holmes 116

Doug Llewellyn '93, CEO, Data Society Group

B: BUILDING LEGACIES: NAVIGATING THE OPPORTUNITIES AND CHALLENGES OF FAMILY BUSINESS

Holmes 202

Kimberly Wetty '93, Head of Brand Culture, Chase Travel Group

C: NAVIGATING MARKET SHIFTS: THE FUTURE OF COMMERCIAL REAL ESTATE AND ECONOMIC DEVELOPMENT

Holmes 129

Lauren Gilchrist '07, EVP and Market Leader, Newmark

11 - 11:45 a.m.
CONCURRENT SESSION 3

A: CULTIVATING SUCCESS: THE POWER OF ORGANIZATIONAL CULTURE IN DRIVING PERFORMANCE AND EMPLOYEE ENGAGEMENT

Holmes 202

Kimberly Wetty '93, Head of Brand Culture, Chase Travel Group

B: ALTERNATIVE INVESTMENT TRENDS, OPPORTUNITIES, AND STRATEGIES

Holmes 251

Casey Galligan '95, Partner, Co-Head of US Wealth Management Solutions, Ares

C: BEYOND THE CFP: DIFFERENT PATHS IN WEALTH MANAGEMENT

Holmes 116

Julienne Egofske '20, Financial Planner, Range

Jennie Sowers '98, Partner, Wealth Advisor, CORIENT

D: ENTREPRENEURIAL LEADERSHIP: SCALING INNOVATIVELY AND NAVIGATING GROWTH

Holmes 129

Matthew Johnson '89, Co-CEO and Co-Founder of TruConnect

Nathan Johnson '89, Co-CEO and Co-Founder of TruConnect

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

Join us for an in-depth look at industry trends and opportunities led by experienced professionals. Open to all University students, faculty, and staff.

Sponsored by the Office of Experiential Learning, Freeman College of Management, Bucknell University

BIOGRAPHIES *(in order of panel)*



SUDHIR KONDISETTY '90, Principal, National Technology Risk Consulting Leader, RSM

Sudhir is RSM's national leader for technology risk consulting, setting the strategic direction for the firm's technology risk services which include information technology (IT) internal audit/Sarbanes-Oxley (SOX), IT external audit support, IT risk assessments, system and organization control (SOC) report services, and other IT risk related services. Additionally, Sudhir serves as the office leader of the Philadelphia office where he is responsible for driving growth in the market and maintaining a strong employee culture in the firm. Lastly, he served as an elected member of RSM's board of directors for a five-year term. In this role, Sudhir provided oversight of the firm's executive leadership team and participated in developing the firm's long term strategic direction. In addition to his responsibilities at RSM, Sudhir is involved in a number of charitable organizations that focus on improving educational and career advancement for underrepresented minorities. This includes: Ascend Greater Philadelphia, board member, HELP Foundation, board member and Collective Success Network, board member. Sudhir holds a bachelor degree in computer science from Bucknell University as well the following professional certifications: Certified Information Systems Security Professional (CISSP), Certified Information Systems Auditor (CISA) and Certified NACD Corporate Directorship.



LEA WALSH '20, Supervisor, Management Consulting, RSM

Lea is currently a Supervisor in RSM's Management Consulting practice on the Technology Advisory team that focuses on strategy and advisory initiatives centered around people, process, and technology. Possessing a background as a management consultant, Lea is driven by a passion for facilitating business transformations and assisting organizations in attaining their strategic objectives. She has had experience in assisting and managing various software selections, technology strategy roadmaps, and application architecture landscape design. Her expertise spans both consulting and marketing, allowing her to bring a distinctive blend of analytical and creative skills to the table, ensuring the delivery of impactful solutions. In her current role as a Supervisor, Lea is instrumental in contributing to the success of clients by delivering insightful management consulting services. Lea's professional journey took root at RSM US LLP, where she initially joined as an intern. Previously Lea interned as a Marketing Assistant at Needham Partners and with Vontobel Asset Management, gaining valuable exposure to the intricacies of the financial sector. Lea's academic foundation was laid at Bucknell University, where she earned her Bachelor of Science in Business Administration.



ELISE PERAZZINI '15, Consumer Data Strategy Lead, L'Oreal USA

Elise Perazzini is a Consumer Data Strategy Lead at L'Oreal USA. In an ever-changing advertising landscape, Elise leads data clean room partnerships at L'Oreal, working with mass, ecomm, and specialty beauty retailers to help create new data collaboration opportunities for L'Oreal's 40+ brands. Elise focuses her data partnerships and strategy efforts on scale, ensuring that partnerships are prioritized based on their ability to benefit most (if not all) brands within the L'Oreal portfolio. She also helps lead audience strategy efforts with the brands, making sure that the data that L'Oreal collects is leveraged in paid media effectively. Prior to joining L'Oreal, Elise had an extensive professional journey from media agency (Omnicom Media Group) to research vendor (Nielsen Catalina Solutions) to publisher (Vevo and Google). At Google, Elise managed all custom advertising measurement for the L'Oreal global team in Paris, which helped her transition to the brand side. She brings all of this varying experience to her current role at L'Oreal USA, leading with strong communication and empathy. Elise received her BA in Political Science and minors in legal studies and Italian studies from Bucknell University. She resides on the Upper East Side of New York City.



KEN FREEMAN '72, Business Executive and Academic Leader

Kenneth W. Freeman's career spans more than fifty years, as a business executive and academic leader. Having most recently served as interim president of Boston University, he is also dean emeritus and professor of the practice at the Questrom School of Business. Ken was the Allen Questrom Professor and Dean of Questrom for eight years, where he led a transformation of the undergraduate and MBA curricula, emphasizing ethics, global citizenship, and high-growth industry sectors. He later developed and taught MBA courses in crisis leadership and corporate turnarounds and held leadership roles in human resources and online education at BU. Ken began his career at Corning Incorporated and served in financial and general management roles. He led the spinoff of Quest Diagnostics, where he led its transformation as Chairman and CEO. Before entering academia he was a partner at Kohlberg Kravis Roberts & Co. (KKR). Harvard Business Review named Ken one of the 100 Best-Performing CEOs in the World in 2010 and 2013. A first-generation Bucknell University alumnus with a Harvard MBA, Ken was a Bucknell trustee for 18 years, serving as chair from 2009 to 2018. In 2018, Ken and his wife, Janice, made a transformational gift to Bucknell which led to the naming of the Kenneth W. Freeman College of Management. He has championed innovation, ethical leadership, and strategic growth in business and education throughout his career.



DOUG LLEWELLYN '93, CEO, Data Society Group

Doug Llewellyn, the CEO of Data Society Group, a pioneering platform that empowers companies to harness the full potential of data and AI, is a seasoned leader in the business information sector. With a proven track record of delivering exceptional business value and maximizing investor returns, Doug has joined forces with Growth Catalyst Partners to create a new platform dedicated to advancing data leadership and fostering data-driven organizations. His people-centric approach to driving results has led multiple companies to successful exits, even amidst challenging market conditions. By cultivating a company culture where employees are deeply invested in the company's mission, Doug ensures alignment among employees, customers, and investors. Doug holds a BA in Economics and French from Bucknell University and is on the Advisory Board of Bucknell's Dominguez Center for Data Science.



KIMBERLY WILSON WETTY '93, Head of Brand Culture, Chase Travel Group

Kimberly Wilson Wetty is an Executive Director at JPMorganChase where she serves as Head of Brand Culture for Chase Travel Group. A proven leader with more than 30 years in the luxury travel sector, Kimberly specializes in brand marketing strategy and uses those skills to create a work culture that embraces creativity, innovation, and collaboration while never losing sight of integrity, humility, and compassion. Prior to her role with Chase Travel Group, Kimberly served as Co-President of leading luxury travel advisory, Valerie Wilson Travel (VWT). During her tenure at VWT, she helped build the brand into one of the largest and most respected full-service travel management companies in the U.S. Among her key remits was leading the brand's leisure sales, marketing, and human resources. In 2021, VWT sold the business to a leading travel management company, FROSCH. JPMorganChase acquired FROSCH in 2022.

Today, Kimberly remains a leading and respected luxury travel expert, sharing her advice and experiences with media, consumers, and the industry, alike. Her creativity and drive to deliver customer service excellence afforded VWT and herself to win countless awards and recognitions, and she served various advisor boards including Travel+Leisure, Celebrity Cruises, Rosewood Hotels & Resorts, and Six Senses. Kimberly is a YPO (Young Presidents' Organization) member, serves on the Board of Directors for Swim Across America, and is the former President of the Bucknell University Alumni Association, where she is a proud alum. When not working or traveling, Kimberly loves spending time with her husband, two adult children, and their Bernadoodle Tusker (named after the Kenyan beer). Passionate about volunteering and creating a world that embraces kindness, grace, and non-judgment, she attempts to lead by example in all aspects of her life, and her travel motto is "travel with an open heart and mind."



LAUREN GILCHRIST '07, Executive Vice President, Market Leader, Newmark

Lauren Gilchrist is the Executive Vice President and Market Leader of the Greater Philadelphia Region for Newmark, a global leader in commercial real estate services. Lauren is responsible for the firm's full suite of service offerings in the region, managing strategic planning, revenue growth and profitability, recruitment, and business development in the company's Philadelphia, Wayne, Southern New Jersey, and Delaware offices.

Lauren holds appointments to the Board of Directors for the Philadelphia Facilities Management Corporation/Philadelphia Gas Works, Philadelphia Orchestra, Old City Community Fund, M&T Bank Director's Advisory Council, Bucknell University Real Estate Advisory Board, and the Greater Philadelphia Chapter of NAIOP—where she served as Chapter President from 2019 to 2020. In addition, she has been recognized by the Philadelphia Business Journal as a 40 Under 40 honoree and a Woman of Distinction, as a Philly Power Woman by Bisnow, as a 2023 "Above and Beyond" Honoree by City & State Pennsylvania, and as one of the 150 Most Influential Philadelphians in 2023.

Prior to joining Newmark, Lauren was the Managing Director of Research at Longfellow Real Estate Partners, where she directed research strategy, content creation, and thought leadership, and provided market research to drive project underwriting and execution. Previously, she also held roles as Senior Vice President of Research at JLL, Manager of Research & Analysis at the Center City District, and Program Manager at the Center for Regional Economic Competitiveness. Lauren received her BS in Business Administration from Bucknell University and her MS in Public Policy and Management from Carnegie Mellon University's Heinz College.



CASEY GALLIGAN '95, Partner, Co-Head of US Wealth Management Solutions, Ares

Mr. Galligan is a Partner and Co-Head of the US business within Ares Wealth Management Solutions, which oversees Ares' client management activities in the global wealth channel. Prior to joining Ares in 2021, he was a Managing Director, National Sales Manager at Black Creek Capital Markets, where he was responsible for hiring, training and leading a distribution team of the firm's regional consultants. Previously, Mr. Galligan was a Managing Director in the Wealth Management Division at Morgan Stanley & Co. During his time at Morgan Stanley, he served in various sales and product management roles within the capital markets and investment resources departments contributing to the firm's publications and speaking at client events around the country. In addition, Mr. Galligan worked at Deutsche Asset Management for RREEF Property Trust. Mr. Galligan holds a B.A. from Bucknell University in Economics.



JULIENNE EGOFSKE '20, Financial Planner, Range

Julienne joined Range as a Financial Planner after 4+ years as a Financial Planner at Corient Private Wealth, where she specialized in working with high-net-worth and ultra-high-net-worth clients. She has expertise in guiding individuals through significant life transitions—particularly entrepreneurs, founders, and those navigating divorce. Originally starting her career in Chicago, Julienne recently relocated to New York, continuing her mission to empower clients with tailored strategies that turn financial uncertainty into long-term confidence. Outside of work, Julienne brings her energy to teaching yoga sculpt and draws on her discipline as a former Division I softball player.



JENNIE SOWERS '98, Partner, Wealth Advisor, CORIENT

Jennie is a Partner, Wealth Advisor in our New York City office. Jennie's motivator is making connections—among people, relevant information, ideas and opportunities. Building relationships inside and outside the firm, she is in tune with the nuances of personalities, needs, skills and strategies, asking lots of questions and listening to pinpoint relevant solutions. Jennie's journey in the financial services industry began in 1998 at Paine Webber (then UBS) after graduating from Bucknell University, of which she remains an active alumni and mentor for current students. Since joining the team that became legacy firm KORE Private Wealth in 2002, her roles transitioned from highly technical and market-oriented to relationship-building and business management. Several years ago, prior to the firm's launch, Jennie began transitioning her role away from being a co-portfolio manager across over \$2 billion+ of municipal bonds and began concentrating exclusively on building the broader business and client relationships within the sports and entertainment industries—especially supporting female clients to empower them in their financial lives. Since we launched the firm, these areas of passion have manifested into her leadership of end-to-end philanthropic advisory, including “values-aligned” investing for our clients. This has meshed well with many of Jennie's personal commitments, activities and community leadership, ranging from her church's endowment committee to her children's school to organizing a working women's Paddle league. In addition, Jennie is incredibly active in the broader wealth management community, serving on the advisory councils for Addepar, Ethic and Trusted Advisor. Jennie lives with her husband, JT, and their two children in Montclair, New Jersey.



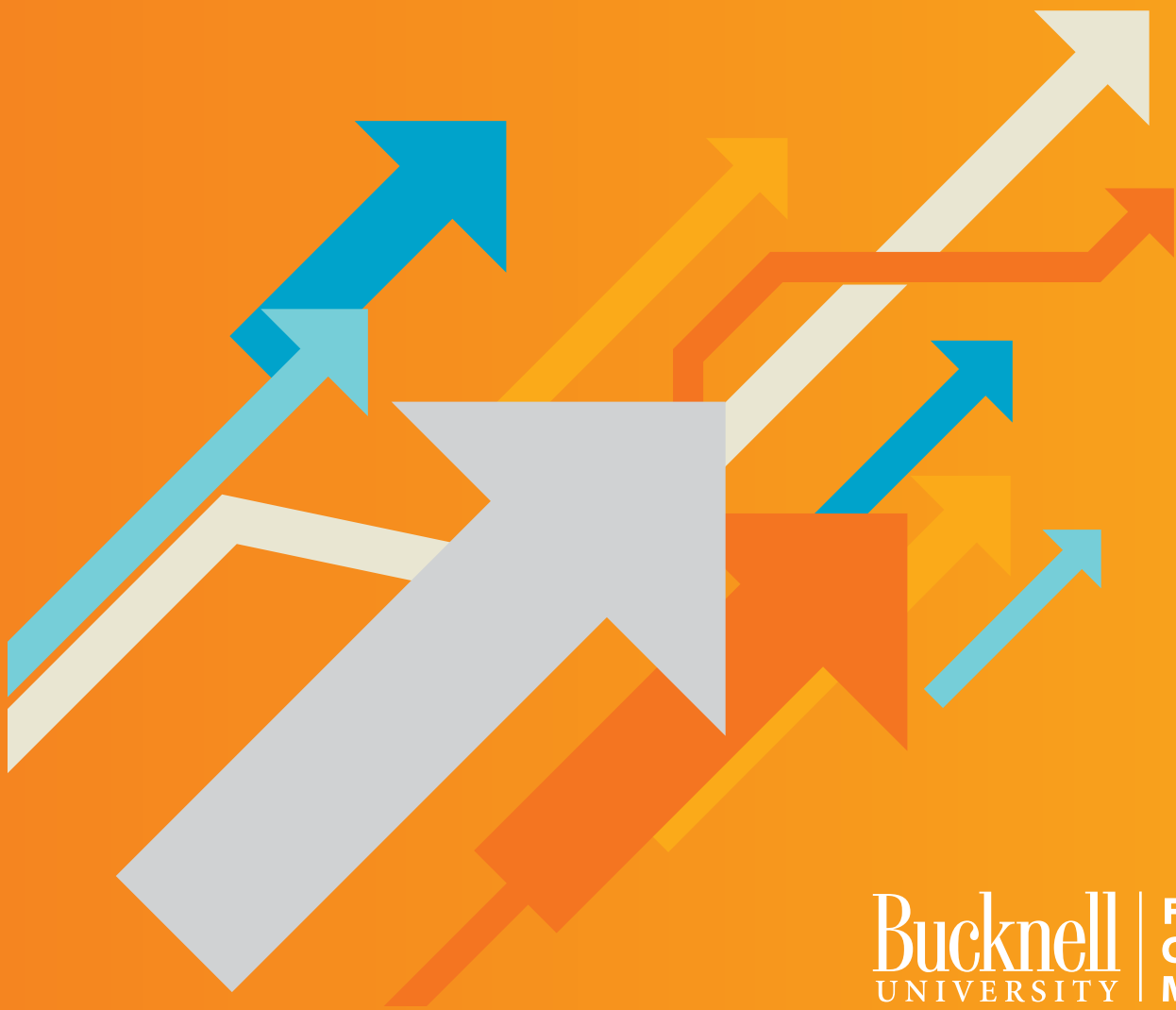
MATTHEW JOHNSON '89, Co-CEO and Co-Founder of TruConnect
*2025 Walling Lecturer

Matthew led TruConnect to prominence as the 4th largest wireless lifeline company and fastest growing in the United States with over 1,000,000 customers nationwide, in his role as Co-Founder, Board Member, and Co-CEO. With his brother Nathan Johnson, Matthew built the company with both internal growth and acquisitions including Telscape Communications, Sage Telecom, and TruConnect Mobile among others. Along with his focus on TruConnect, Mr. Johnson is also a Managing Partner and Board Member of Drake Star Partners, a global technology investment bank headquartered in New York with offices in eight countries. A member of Young Presidents Organization (“YPO”) and a three time finalist for E&Y's Entrepreneur of the Year. Matthew also serves as Chairman for UCP Wheels for Humanity, a non-profit supplying wheelchairs to disabled children and young adults globally. Matthew holds an MBA from Northwestern University's Kellogg School of Management.



NATHAN JOHNSON '89, Co-CEO and Co-Founder of TruConnect
*2025 Walling Lecturer

Nathan is the Co-Founder, Chairman, and Co-CEO of TruConnect, where he oversees the strategic vision and effective governance of the organization. He has co-managed the overall operations and growth of the business with his brother for the last 15 years. TruConnect has earned significant recognition, being awarded Inc. Magazine's 5000 Fastest Growing Private Companies from 2000 to 2024. Nathan is also the Founder and Managing Partner of Drake Star Partners, a global M&A Advisory Firm with offices throughout the US and Europe, where he leads efforts on restructuring and bankruptcy advisory. In addition to his entrepreneurial roles, Nathan serves as a board member of CTIA (Cellular Telecommunications Industry Association), where he contributes to the advancement of policies and initiatives that impact the mobile and telecommunications industries. Nathan's accomplishments have earned him significant recognition, including being named E&Y Entrepreneur of the Year Finalist in Los Angeles for three consecutive years. Prior to his work with Drake Star Partners, Nathan was the Director of Overseas Finance for GM's Treasury Office in New York, where he oversaw all M&A, divestitures, and investments in Latin America. Nathan earned his MBA and MA from the Wharton School and the Lauder Institute at the University of Pennsylvania, with a concentration in Finance and Multinational Management. His focus at the Lauder Institute was a specialized international management program with a concentration on fluency in Spanish and International Studies.



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