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PANELIST & MODERATOR BIOGRAPHIES

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Rosanne E. Ammirati, CPA

Partner | Katz, Sapper & Miller

Rosanne Ammirati is a partner in Katz, Sapper & Miller's Tax Department. She has been with the firm since 1987 and in public accounting since 1981. Rosanne's responsibilities include tax research and tax planning for business entities, individuals, estates and trusts. She provides research and technical support for special tax projects, reviews tax compliance matters, represents clients before state and federal taxing authorities, and frequently speaks on tax topics in Indianapolis.

Rosanne graduated with honors from Boston University with a Bachelor of Science degree in accounting. She also received a Master of Science degree in taxation from Bentley College.

Rosanne is a member of the Tax Division of the American Institute of Certified Public Accountants and the Indiana CPA Society. She also serves on the board of directors of the Phoenix Theatre.



John Aplin

Managing Director | CID Capital, Inc.

John Aplin has been a partner with CID Capital for more than 25 years. He joined CID after serving as President and CEO of The Fuller Brush Company, a widely recognized supplier of consumer products. The company was acquired from Sara Lee Company in a transaction led by John. Prior to Fuller Brush, John was President and Founder of two investment banking firms in Kansas City, Missouri. He has been involved in nearly 200 business transactions since 1984 in industries ranging from basic manufacturing to information technology and business services.

John has extensive experience in medical device manufacturing, health care services and biotechnology. He has served as a consultant to Fortune 500 companies, including Marathon Oil Company, Eli Lilly and Company, and General Electric. From 1975 to 1984, John served as a faculty member in the Graduate School of Business at Indiana University (The Kelley School) and Chairperson of the Master of Business Administration Program. He has been awarded the Certified Management Consultant designation, as well as numerous teaching excellence awards.

John has served on the boards of directors of more than 25 private and public companies. He has been involved in the IPOs of Endocyte, Inc., Acordia, Inc. and Stereotaxis, Inc. and served as “Financial Expert” on several audit committees as required for Sarbanes-Oxley compliance. John currently chairs the board of Endocyte, Inc. and sits on several private company boards where he is active in strategic planning, organizational development and financial management.

John has authored more than 50 articles on business topics and is the co-author of a graduate management text. John served as a Naval Flight Officer in the U.S. Navy, where he was recognized as a “Distinguished Naval Graduate. He was selected as a founding member of the



Brian Baker

Executive Vice President of Corporate Finance | City Securities Corporation

Brian Baker has advised clients ranging from small, family-owned businesses to large, multinational, publicly-held corporations on accounting, financial, tax and legal aspects of corporate transactions since 1995. Brian has advised on cross-border transactions involving companies based in Canada, Europe, South America and Asia.

Prior to joining City Securities in 2004 and being appointed head of City Securities Corporate Finance in 2013, Brian practiced as a certified public accountant with the Indianapolis office of Deloitte & Touche LLP, an international public accounting firm, in the areas of business advisory and assurance services as well as tax compliance and consulting services. While at Deloitte & Touche, Brian served clients in the distribution, manufacturing and financial services sectors, and advised on several mergers, acquisitions and public offerings of securities. Brian then practiced as an attorney with the Indianapolis law firm of Krieg DeVault LLP in the areas of corporate transactional law, financial institutions law, tax law and securities law.

Brian holds a law degree from the Indiana University School of Law, a Bachelor of Business Administration in accountancy from the University of Notre Dame, and FINRA Series 7, 24 and 63 securities registrations in Indiana. Brian has been active in many community and professional organizations throughout his career and is a frequent lecturer and speaker on corporate finance-related topics.



David W. Barrett

Partner | Faegre Baker Daniels

David Barrett's mergers and acquisitions experience includes representing buyers, sellers and investment banks in the negotiation and consummation of transactions in manufacturing, chemicals, retail, service, logistics, financial institutions, food and agriculture, life sciences, oil and gas, alcoholic beverages and other industries.

David also represents companies headquartered in more than a dozen states, as well as several headquartered internationally. In addition to M&A, David has led multiple joint venture and other strategic transactions, including several public-private partnership transactions.

David's clients range from very small businesses with single owners to multinational companies. He has handled transactions ranging from less than \$1 million to \$1.9 billion, with the majority of his practice involving middle market deals of less than \$100 million.

David also focuses on succession planning, working closely with business owners and management teams to develop and implement leadership and ownership succession plans. These plans are often multiple years in the making and typically involve working alongside members of the firm's wealth management team.

[Read full biography](#)



Jim Birge

Partner | Faegre Baker Daniels

Jim Birge serves as legal advisor to high-growth businesses and private equity firms for complex transactions, general corporate counsel and economic incentive matters. Jim is the founder and chair of Faegre Baker Daniels' Mergers & Acquisitions Conference in Indianapolis, which is the largest event of its type in Indiana. Jim's mergers and acquisitions experience includes representing buyers, sellers, joint ventures and mezzanine lenders in the negotiation and consummation of transactions in various sectors and stages of development — with clients ranging in size from closely-held businesses to a Berkshire Hathaway affiliate, and from early-stage technology companies to a Fortune 50 chemical manufacturer. Jim currently serves as transaction and/or general corporate counsel to clients in the following industries, each of which maintains a top 10 U.S. and/or global market share in its respective market: consumer beverage, professional liability insurance, insecticide/pesticides/herbicides, consumer packaging, sports and entertainment, durable medical equipment, snack food products, farming, multifamily housing, and education. Jim is president-elect for the Association of Corporate Growth and also serves on the Indy Chamber of Commerce Board of Directors. Jim is a graduate of North Central High School, Harvard University and the University of Michigan Law School.

[Read full biography](#)



Daniel L. Boeglin

Partner | Faegre Baker Daniels

Dan Boeglin is a corporate and transactional lawyer who specializes in representing companies that develop, make and sell medical devices and pharmaceutical products. He has represented leading medical device and pharmaceutical companies, including Baxter Healthcare, Eli Lilly and Zimmer, in mergers and acquisitions, corporate partnering, joint venture, strategic investment, licensing, distribution, and other transactions.

Dan serves as outside general counsel to a number of biotechnology companies, including CoLucid Pharmaceuticals (Nasdaq: CLCD) and Endocyte (Nasdaq: ECYT). He has been lead counsel in the formation of multi-party joint ventures in the fields of biomarker discovery, proteomics research and electronic health records. Dan completed the Biotechnology for Business program at Duke University in 2004.

[Read full biography](#)



Doug Conner

Managing Director | Periculum Capital Company

Prior to joining Periculum in 2011, Doug Conner was an investment banker at McDonald & Company Securities, Inc. from 1990 to 1996. While at McDonald, he was responsible for its corporate finance activities in Indiana. In that capacity, Doug worked on a wide variety of investment banking transactions, including initial public offerings (IPOs), debt placements, private equity raises, buy- and sell-side merger and acquisition transactions, valuations, and fairness opinions.

Immediately before joining Periculum, Doug was a Principal of BrightPath Capital, Inc., an Indianapolis-based private equity firm he co-founded in 2006. Prior to founding BrightPath, Doug was a Principal at Cardinal Ventures, LLC, a family-owned private equity partnership. While at Cardinal, he was involved in approximately 25 platform and add-on transactions and was actively involved in portfolio company oversight.

Doug also worked as a Consultant at Bain & Company and as a Marketing Representative for IBM Corporation.

Doug earned a B.A. in Economics and Mathematics from DePauw University and an MBA from the Harvard Business School, where he was a Baker Scholar. Doug currently serves as a Director of several private companies.



Dan Corsaro

Partner – Transaction Advisory Services | Ernst & Young

Dan Corsaro is a partner in Ernst & Young's Transaction Advisory Services practice. Prior to returning to E&Y in 1999, Dan practiced tax law in the tax and mergers & acquisitions areas as a partner with one of Indianapolis' largest law firms.

Dan has assisted many firms across the country in a variety of taxable asset acquisitions, taxable share acquisitions, tax-deferred asset acquisitions, tax-deferred share acquisitions, initial public offerings, management buyouts, leveraged buyouts, joint ventures, spin-offs and other strategic alliances and financing transactions as well as internal restructurings.

Dan's experience extends to a variety of industries, notably including consumer products, private equity, insurance, life sciences and manufacturing organizations.

Dan graduated from the University of Notre Dame with a Bachelor of Business Administration in Accounting. He is a licensed Certified Public Accounting in Indiana. He graduated from Indiana University School of Law – Indianapolis.



Bruce Engler

Partner | Faegre Baker Daniels

Bruce Engler is the leader of Faegre Baker Daniels' mergers and acquisitions practice. Bruce has represented buyers, sellers and institutional investors in many different types of public and private M&A transactions. He has been lead counsel representing strategic and private equity clients in scores of significant M&A transactions with aggregate deal values totaling billions of dollars. In 2016, *Chambers USA* ranked Bruce as one of the top three Corporate/M&A attorneys in Minnesota. In recent years, Chambers USA has described Bruce as "one of Minnesota's preeminent M&A lawyers," "the 'cream of the crop' among M&A lawyers," "pragmatic and reasonable" and "a very business-oriented lawyer who focuses on the deal." Bruce has been quoted frequently in the media on M&A topics. He was named Minnesota's 2016 M&A Lawyer of the Year by *The Best Lawyers in America*.

[Read full biography](#)



Brian Fennerty

Partner | Faegre Baker Daniels

Brian Fennerty concentrates his practice in the area of business planning, providing advice in connection with business formation, joint ventures and partnerships, raising capital, mergers and acquisitions, and tax planning. He has extensive experience in preparing and negotiating partnership and operating agreements, merger and acquisition agreements, and representing clients in tax proceedings.

Before joining Faegre Baker Daniels, Brian worked for the national accounting firm of Price Waterhouse from 1984 through 1988, concentrating primarily in federal and state taxation.

[Read full biography](#)



Andrew Hedegard

Vice President, Indiana Middle Market, Commercial Banking | JPMorgan Chase & Co.

Andrew is a Commercial Banker in the Indiana Middle Market Banking Division of Chase, a leading provider of commercial banking services to mid-sized companies in this market. Andrew is responsible for developing and managing client relationships with companies \$20MM+ in sales revenue.

Andrew has over 11 years of banking experience. He began his banking career with Bank One in 2004 as a Licensed Personal Banker, then moved into Business Banking as a Senior Relationship Manager. In 2015, Andrew transitioned to Commercial Banking.

Andrew received his Bachelor of Science Degree in Business Management at The University of Saint Francis. He was a four-year scholarship football player.

Andrew is an active member of the Indiana community, serving on the AYS Inc. Board of Directors in the Executive Committee and Finance committee. He has served as a Board Member and Advisor for various organizations over the past several years.

Andrew and his wife reside in Fishers, Indiana, and have three daughters. His hobbies include Ironman Competitions, golfing, traveling and spending time with his family.



Ken Higgins

Managing Director | Greene Holcomb Fisher

Ken Higgins is a Managing Director at Greene Holcomb Fisher, where he leads the health care team. He has more than 25 years of M&A and private equity experience as an investment banker, private equity investor and transactional lawyer.

Prior to joining Greene Holcomb Fisher, Ken was a partner with SightLine Partners, a health care-focused venture capital firm. Together with its predecessor, Piper Jaffray Ventures, Sightline completed more than 45 health care investments during his tenure, distributed across the health care services, health care IT and medical technology sectors. Ken previously led Piper Jaffray's Health Care Services M&A practice and practiced law at Dorsey & Whitney in Minneapolis and Kirkland & Ellis in Chicago, where he specialized in M&A, public and private securities offerings, and leveraged buyouts.

Ken holds a BBA from the University of Michigan's Ross School of Business and a JD from Harvard Law School.



Gary Laitner

Partner | Faegre Baker Daniels

Gary Laitner is a qualified solicitor in England and Wales, and he is a Partner in the London business and corporate services group.

Prior to joining Faegre Baker Daniels, Gary was a Partner at Crowell & Moring and a worldwide partner in the tax and legal practice of Arthur Andersen. He has considerable experience in all types of company and corporate finance transaction, including acquisitions, disposals and joint ventures. Gary has particular experience in cross-border merger and acquisition work, and antitrust issues.

[Read full biography](#)



Robert W. Leasure, Jr.

President | LS Associates, LLC

Bob Leasure is the president and managing member of LS Associates LLC, a crisis management and turnaround firm headquartered in Louisville, Kentucky. LS has worked with more than 250 companies with debt ranging from \$500K to \$ 250M. LS serves clientele in both the United States and internationally in various industries.

Bob has more than 30 years of experience primarily in dealing with turnaround situations either in formal reorganizations or informal out of court reorganization and in dealing with companies that may have operational or shareholder disputes.

Bob has established a credible reputation and has developed many relationships with banks, finance companies, financial consultants and attorneys, as well as a vast network of industry specific resources. In addition, he has extensive experience in vendor negotiation, bank negotiations, identifying and recovering assets and creditor committee relations, and as a Chapter 11 Trustee, he has experience in research and forensic reviews to identify and recover assets and execute preference recoveries.



Karen H. Mersereau MST, CPA/PFS, CFP®, CIMA®

Managing Director | Oxford Financial Group

Karen Mersereau is a Managing Director with Oxford Financial Group, Ltd. In her role, Karen works closely with individual clients to develop optimal financial, investment, tax and estate planning strategies. Through these strategies, she assists clients in reaching their financial goals and preserving family wealth. Karen's background also lends itself well to addressing the needs of Oxford's institutional clients, including endowments, foundations and other tax-exempt pools of assets.

Before joining Oxford in 2010, Karen was a managing director of KSM Capital Advisors, a registered investment advisor, and a partner with Katz, Sapper & Miller specializing in wealth planning for high net worth clients. Karen has significant experience working with owners of closely-held businesses incorporating strategic pre-exit planning to transfer wealth and enhance their desired legacy. She enjoys working with business owners both pre- and post-sale to bring value at all stages of their business succession planning.

Karen is a graduate of Indiana University with a bachelor's degree in Accounting and a master's degree in Taxation from Pace University in New York. She holds the designation of Certified Public Accountant (CPA) and Personal Financial Specialist (PFS) from the American Institute of Certified Public Accountants, of which she is a member. She is also a member of the Indiana CPA Society (INCPAS), a Certified Financial Planner (CFP®) professional as governed by the Institute of Certified Financial Planners, and holds the Certified Investment Management Analyst (CIMA®) designation from the Investment Management Consultants Association.

Karen's financial acumen is also tapped in community service work. She is currently serving on the board of directors of the Indianapolis Symphony Orchestra and has previously served as treasurer. In the past, she has served as a member and treasurer of the Board of Governors



Gretchen B. Perkins

Partner | Huron Capital Partners

Gretchen Perkins is responsible for managing Huron's business development and investment sourcing activities, including outreach to deal professionals such as business brokers, investment banks, attorneys, accountants and consultants.

Gretchen has more than 25 years' experience in the finance and business development sectors serving a variety of capital market participants. Prior to joining Huron, she led the acquisition sourcing efforts at Long Point Capital, a middle market private equity fund. Gretchen also served as Vice President – Business Development for IRN, Inc., a market research firm, and has held senior business development positions at Fleet Capital Corporation and GE Capital Corporation, where she originated and structured senior debt packages for buyouts of middle-market companies.

Gretchen is a Director at Large with the Association for Corporate Growth, Inc. Global Board of Directors; a Director for the Detroit Chapter of the Association for Corporate Growth (ACG); Co-Chair of the ACG's Public Policy Committee; Board Member for the Michigan Chapter of the International Women's Insolvency & Restructuring Confederation; Board Member for United Cerebral Palsy of Detroit; and a mentor for the Women of Tomorrow organization which mentors at-risk high school girls.

Gretchen received her B.B.A. from the University of Michigan.



Wendy Ponader

Partner | Faegre Baker Daniels

Wendy Ponader has extensive experience representing clients in business, commercial and financial transactions, as well as in general business matters. Her practice includes creditors' rights, bankruptcy and business workouts. Wendy also represents purchasers of companies or the assets of companies in bankruptcy cases. Her practice also includes general and transactional representation of mid-sized business and publicly held business organizations, including manufacturing, distribution and professional services companies.

Wendy first joined Faegre Baker Daniels in 1988 after beginning her career in Chicago at a boutique business insolvency firm. She was a partner of the firm on the commercial, financial and bankruptcy service team until founding Ponader & Associates LLP in 2003. Wendy rejoined Faegre Baker Daniels after six years with Ponader & Associates.

[Read full biography](#)



Melissa M. Pozniak, CPA

Partner | BKD

Melissa Pozniak recently joined BKD as a tax partner. She specializes in partnership taxation and spends a portion of her time dedicated to serving as a national technical specialist in Subchapter K taxation. She also works extensively with private equity funds and is involved with tax compliance, due diligence and planning.

Melissa began her career in 1997 with a large international accounting firm where she spent more than 18 years working with private equity funds, real estate entities and privately held companies and their owners.

Melissa actively serves many privately held clients and their owners. She has experience working with companies and their owners through many of their key life cycle events. She has been involved with tax compliance and planning, including structuring acquisitions and divestitures, business succession and wealth transfers.

Melissa has given presentations on partnership and S corporation tax matters for Lorman Education Services and Tax Club of Cleveland. She is a member of the American Institute of CPAs and The Ohio Society of Certified Public Accountants. Additionally, Melissa is board member of City Year Cleveland, an organization dedicated to increasing the graduation rate of students in the Cleveland municipal schools and works with the Cleveland Zoological Society and Cuyahoga Valley National Park.

Melissa is a graduate of Miami University, Oxford, Ohio, with a B.S. degree in accounting.



Brian W. Schmidt, CPA

Partner | Katz, Sapper & Miller

Brian Schmidt is a partner in Katz, Sapper & Miller's Business Advisory Group. He has been in public accounting since 1994. Brian provides tax, accounting and consulting services to a wide variety of businesses and industries. These services include tax planning and strategies, tax compliance, financial statement analysis, mergers and acquisitions, and financing assistance. Brian is a member of the firm's Transaction Services Group, Life Sciences and Technology Services Group and Manufacturing and Distribution Services Group. He is also a KSM mentor and serves on the firm's Strategic IT Planning Committee.

Brian is a member of the American Institute of Certified Public Accountants, the Indiana CPA Society, the Ohio CPA Society, and the Alliance of Merger and Acquisition Advisors. He previously served as board chair of School on Wheels.

Brian received both a Bachelor of Science degree in accounting and a Master of Accountancy degree from Miami University.



Jeff Schneiders

Managing Director | The Chicago Corporation

Jeff Schneiders is a Managing Director of The Chicago Corporation.

Jeff Schneiders has over 25 years of investment banking experience principally in mergers and acquisitions. Mr. Schneiders has completed over 100 middle-market transactions ranging from exclusive sales for private companies and private equity firms to divestitures from publicly traded companies. He has also raised financing for numerous clients.

Mr. Schneiders' industry experience is broad based, spanning primarily the industrial, food and business services sectors. He also has extensive Special Situations expertise representing underperforming companies in distressed sale transactions both in and out of bankruptcy. Jeff has won numerous transaction-related awards, and he frequently speaks on the topic of middle-market mergers and acquisitions.

Prior to joining The Chicago Corporation, Mr. Schneiders was Managing Director and co-head of Fort Dearborn Partners' investment banking practice. Previously, he was a Managing Director in corporate finance at Andersen and Mesirow Financial, Inc. In addition to his investment banking experience, Mr. Schneiders has worked in sales at IBM Corporation and public accounting at Arthur Andersen.

Mr. Schneiders is a member of the Association for Corporate Growth, the Turnaround Management Association and the Indiana Association for Corporate Renewal. He also is a former board member of an investment firm with oversight responsibilities in alternative assets including private equity and venture capital.

Mr. Schneiders earned an MBA from Northwestern University with an emphasis in Finance and Marketing. He earned his undergraduate degree from Miami (Ohio) University in Accounting. Mr. Schneiders is a Certified Public Accountant. He is qualified as a General Securities Representative and a General Securities Principal.



Scot Swenberg

Managing Director | CID Capital

For nearly 20 years, Scot Swenberg has energized management teams, motivating them to challenge themselves to achieve goals they only dreamt were possible. To reach these summits, Scot helps management teams put in place the resources and the team to make it all happen.

Scot has served on the board of numerous CID portfolio companies in both consumer product and industrial product industries. When Scot isn't helping management teams scale their businesses, he is leading CID's investor relations and fundraising activities.

Scot is also very active in the community. He currently serves on the Board of Trustees for the Indiana Chapter of The Nature Conservancy, the leading conservation organization working around the world to protect ecologically important land and water. He also recently served on the Board of Directors of the Venture Club of Indiana, an Indianapolis-based organization offering opportunities for networking education and information sharing among entrepreneurs and business owners.

Prior to joining CID in 1997, Scot worked as a software engineer for Honeywell-Bull and later as a financial analyst for Bull Worldwide Information Systems. Scot received an MBA from the University of Chicago, a master's degree in Computer Science from Arizona State and a bachelor's degree in Electrical Engineering Technology from Purdue University.



Thomas Van Der Meulen

CEO | Backyard Products

Operating Partner | Source Capital LLC

Thomas has been an Operating Partner with Source Capital LLC since 2003. As such, he is CEO of Backyard Products (market leader in consumer storage sheds and play sets), Chairman of the Penray Companies (automotive chemicals), a director with Aerial Access Equipment (construction equipment rental) and also serves in Source's investment committee. Prior to Source, he served as President and CEO of Kärcher USA (consumer power equipment), as Division President with Playcore and as Division President with Royal Ten Cate NV. Thomas holds an MBA from the University of Georgia and a B.A. in Business Administration at Nijenrode Business University in the Netherlands.