



Exit
Planning
Institute®

Greater Phoenix Chapter



EPI GREATER PHOENIX CHAPTER:

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PREMIER ESTATE PLANNING



For over fifty years, Morris Hall, a premier estate planning law firm, has provided quality legal services. The firm has helped tens of thousands of families protect their assets through comprehensive estate planning and estate administration services.

WHY MORRIS HALL

- We have helped preserve the legacies of tens of thousands of families for over 50 years.
- We listen and care for the people we serve, providing plans to protect them, their legacies, and their families.
- We have compassion and empathy for our clients and build lifelong relationships.
- As members of the *American Academy of Estate Planning Attorneys*, our firm offers a wide range of advantages and benefits that place us in a unique position to handle the most complex estate planning and financial matters.



OUR SERVICES

- Wills and Trusts
- Powers of Attorney
- Trust Administration and Probate
- Advanced Estate Planning
- Preparation of Health Care Documents



To schedule a complimentary estate planning consultation, please call **1-888-222-1328** or visit **morristrust.com** to download our free Estate Planning Worksheet.

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CHAPTER



LOCAL LEADERSHIP / FOUNDING MEMBERS:



Trace Udall, CFP®, AIF®, CEPA®, Chapter President

Wealth Advisor, Owner at Udall Financial
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At Udall Financial, a boutique private wealth management firm, we focus on building strong relationships and prioritizing client education, which sets us apart in the wealth management industry. My roles as the founding member and current president of the Greater Phoenix Chapter of the Exit Planning Institute highlight my commitment to supporting business owners in maximizing the value of their ventures. I am dedicated to managing wealth and empowering clients to achieve their broader life goals. With over 30 years of experience, I am clearly passionate about what I do!



Bruce Hosler, EA, CFP®, CPWA®, AIF®, CEPA®, Chapter Vice-President

Wealth Advisor, Founder at Hosler Wealth Management, LLC
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Bruce is the founder and principal of Hosler Wealth Management, LLC, with offices in Prescott and Scottsdale and over 28 years of experience. He primarily serves pre-retirees, retirees and widows, using advanced tax strategies to help them move toward a tax-free retirement while preserving their wealth. Bruce is credentialed as an Enrolled Agent, CERTIFIED FINANCIAL PLANNER® professional, and Certified Private Wealth Advisor (CPWA®). He is the author of the book MOVING TO TAX-FREE™ Strategies For Creating Tax-Free Retirement Income And Tax-Free Lifetime Legacy Income For Your Children, and the host of the Protecting and Preserving Wealth Podcast. Recognized as a top financial advisor by Forbes for seven consecutive years, Bruce continues to be honored as a Chairman's Level advisor in 2024, a distinction given to only 4% of advisors at Commonwealth Financial Network. Outside of work, Bruce enjoys spending time with his wife, Laura. He is also an avid golfer who appreciates the sport's challenges and beauty.



Phil McNulty, CFP®, MPAS®, CEPA®, CRPS, Chapter Vice-President

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Phil has been in the financial services industry since 2010. He is a Master Planner Advanced Studies™ designee, currently the highest professional designation in the financial services industry. He earned this in concert with earning his Masters of Science in Personal Financial Planning in 2018. These studies expanded significantly on the topics he studied while becoming a Certified Financial Planner™ in 2015. Phil believes solid financial planning is the result of understanding each person's unique situation and goals. He is proud to bring years of study and experience to bear on each interaction and works hard to find thoughtful and innovative solutions to every problem. Before working as a Financial Advisor, Phil served two tours in the United States Marine Corps and worked for several years afterward supporting the United States military, both domestically and overseas. He has lived in every time zone in the country and still loves to travel. He believes his diverse background gives him the ability to convey any financial topic into everyday language so his clients can make informed decisions with confidence.

CHAPTER DIRECTORY:

Use the information below to connect and collaborate with local industry experts in the Greater Phoenix area. List organized by Advisor Type.

Attorneys



Andrea Claus

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Andrea is originally from Minnesota but has called Arizona home for many years. Andrea received her bachelor's degree from Arizona State University, graduating Summa Cum Laude. She received her law degree at the Phoenix School of Law, where she was both an editor and contributing writer for the Phoenix Law Review, was a recipient of the Governor Raul Castro Scholarship for Academic Excellence, and graduated Cum Laude. Andrea's areas of practice include estate planning, probate and trust administration, charitable planning, and succession planning. Andrea takes a comprehensive approach to estate planning and sincerely cares for her clients. Andrea and her husband have three beautiful daughters and enjoy all things outdoors. Along with her legal practice, Andrea serves on the Council of Our Saviour's Lutheran Church and is active in both the legal and philanthropic communities.



Brooks Crandell

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Brooks was born and raised in Arizona as the second oldest of 6 children. Although he lived in Nevada and Washington for a time, he has always called Arizona his home. Prior to law school, Brooks owned and operated a small pest control business in the East Valley. Brooks received his bachelor's degree in business administration from the University of Phoenix. He graduated cum laude from Gonzaga School of Law in Spokane, WA, where he was an editor for the Gonzaga Law Review. Brooks brings valuable experience from several years in trust administration and wealth management at various banks to his current practice areas, which include estate planning, estate administration, and probate. Brooks and his wife, Shelci, currently reside in Mesa, Arizona with their twin sons. He loves the outdoors, spending as much time as possible hiking and paddleboarding. He also volunteers as a coach for the high school mountain biking team. If you catch him outside, he will undoubtedly have his camera with him.



Tim Hall

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Theron M Hall, Jr. (aka Tim) learned early in life the need of proper management of estates for their preservation. Born and raised in Apache County, Arizona, Tim worked for his parents' title company as a youth, where he gained a lasting appreciation for those who work hard to acquire their estates. Now, as an estate planning attorney, protecting his clients' future through quality legal service has become his hallmark. After graduating cum laude with a Bachelor of Arts degree in English and a Master's degree in Public Administration from Brigham Young University, Tim earned his Juris Doctor degree from the University of Chicago. During his legal studies, he was employed as a research associate with the American Bar Foundation. He is currently a member of the State Bar of Arizona and the Iowa State Bar Association.



Michael Halliday

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Michael Halliday was born and raised in Mesa, AZ. He is the youngest of 4 children. Michael learned early on the importance of establishing a proper estate plan. He witnessed firsthand his mom and aunts fighting over his grandmother's meager estate, causing a rift in their relationship that would last until his aunts died. This experience shaped Michael's focus to ensure individuals and families could avoid this unnecessary trauma and have peace of mind by establishing and maintaining a suitable estate plan. Michael attended Mesa Community College earning an Associates of Arts degree and then graduated from Arizona State University, Cum Laude with a Bachelor of Arts degree in Chinese. During his time at ASU, he participated in a 9-week Chinese language immersion program at the Peoples University in Beijing China. After graduation, he attended Willamette University, College of Law and in 2004. After his first year in law school, he attended a 5-week International Law program at the East China University of Political Science and Law in Shanghai, China.



West Hunsaker

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West Hunsaker was born in Melbourne, Florida and moved to Phoenix, Arizona during his teen years. West was blessed to be born into a good family who taught him the importance of protecting your loved ones and helping others. These teachings have influenced every aspect of his life and were a motivating factor for joining Morris Hall as an estate planning attorney. West attained his Bachelor's degree in Business and Marketing from Western International University, graduating Cum Laude. He later attended the Phoenix School of Law where he obtained his Juris Doctorate degree prior to being admitted to the Arizona Bar Association. Prior to joining Morris Hall, West worked for over 12 years as a Vice President for JPMorgan Chase & Company in New York City. During this time he managed an \$8 billion portfolio and served as a representative on an industry-wide team focused on legislative issues affecting banking customers.



Leighton Tyau

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Hello, I'm Leighton Tyau, the founder and principal attorney at Copper State Estate Planning, a boutique law firm in Arizona. I provide tailored estate planning services to individuals and families who want to protect and preserve their legacies. Originally from Hawaii, I earned my Bachelor's degree in economics in Oregon before moving to Arizona, where I completed my J.D. and have lived for over a decade. At Copper State Estate Planning, I focus on complex estate planning issues like business succession, trusts, and tax planning, always crafting personalized solutions that fit each client's unique circumstances. When I'm not helping clients plan for their future, you can usually find me hiking or playing pickleball on the weekends.



Pacer Udall

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Pacer is driven by faith in the future and known for his positivity and innovation in creating unique advantages for business owners while securing and leveraging their patents, trademarks, and other intellectual property. He recognizes that you reap what you sow and seeks to propagate impactful strategies and processes in collaboration with clients that build company value.

Business Consultants



Jim Carroll, CEPA®

Business Consultant, BBW Strategies LLC
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Today I am a full time business broker. But as a former owner of three successful businesses, I understand firsthand the dedication, passion, and hard work it takes to build a thriving company. With a finance degree and certification as a Certified Exit Planning Advisor (CEPA), I've combined my experience and expertise to help business owners harvest the true value of what you've built. My focus is on guiding owners through the process of selling their business, ensuring that they not only reap the financial rewards but also see the legacy of their hard work continue with a new owner. I specialize in identifying created business value, working with owners to quickly maximize their business's worth, and secure the best possible outcome. I formerly spent over 40 years in the building material and lumber manufacturing space. For several years I provided part time consulting to help business owners improve operations, sales, and marketing. In early 2023 I transitioned to be a full time business broker.



Joe Evers

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Joe Evers is a CPA with over 30 years of public accounting experience working with a wide variety of clients. He is a partner of Evers Robinson Ltd. in Phoenix, Arizona. Evers Robinson Ltd., which was founded in 1989, provides services to business clients and their owners. Prior to starting his own firm, Joe was a senior manager with KPMG and also held various positions in industry. Joe also taught accounting at a Pennsylvania college for 3 years. As a Certified Exit Planning Advisor (CEPA), Joe assists clients with unlocking their business wealth by identifying areas for profit and valuation improvement. Joe's goal is to help his clients manage and maximize the value of their biggest asset in order to achieve their business and personal goals.



Amy Morin, MBA, CEPA®

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As a seasoned entrepreneur turned Certified Exit Planning Advisor (CEPA), EOS Implementer, and Certified Outgrow Sales Advisor, I've lived the journey of building businesses to intentionally maximize value. I co-founded a company, rapidly scaling it from \$0 to \$40M in revenue in multiple states. After navigating that startup's explosive growth, I executed a lucrative exit. Not one to rest, I purchased a struggling fly-fishing resort in Montana in need of a turnaround. Applying my expertise, I revitalized operations and systems positioning it for another profitable exit. Consulting for a company running on EOS, I realized the power of EOS for driving focus, accountability, and execution.



Brian Suddarth

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Brian Suddarth is a Founding National Practice Partner dedicated to driving financial growth by optimizing business efficiencies, boosting profits, and enhancing cash flow. With over 20 years of expertise in sales leadership, operational strategy, and entrepreneurship, he specializes in unlocking working capital across healthcare, nonprofit, manufacturing, retail, and distribution sectors. His approach not only drives cost reduction but also significantly improves EBITDA and company valuations, positioning organizations for long-term success. Partnering with ERA Group, a globally recognized consultancy with over 31 years of expertise and 40,000+ projects completed, Brian has helped businesses worldwide save billions. ERA's comprehensive strategies cover more than 50 cost categories, including but not limited to packaging, telecommunications, insurance, and freight. Their self-funded, contingency-fee model ensures clients realize actual savings, while our ongoing auditing and monitoring processes safeguard against future expenditure leakage and maintain the achieved cost reductions.



Tim Young

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As the Managing Partner at WealthPoint, Tim provides his clients consultation on family business, growth, business succession planning, and owner exit strategies. Tim joined WealthPoint at the end of 2010 through the merger of Liquidity Partners, a firm he co-founded in 2006. Tim has over 20 years of experience building a family-owned 2nd generation product and equipment distribution company into a business that employed more than 120 people operating in three states. Tim has held positions ranging from Sales & Marketing to President and CEO. He has been through each phase of the business life cycle from growth and succession to the successful sale of the business to a fortune 500 company. He has spent the last 17 years helping business owners and their stakeholders achieve life changing results.

CPAs / Accountants / CFOs



Scott Gardner

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Scott Gardner grew up and lives in Mesa, Arizona and is the owner of ASG Consulting. He has a Bachelor's degree in Business and a Master's degree in Accounting. At a young age Scott began working in construction and continued that to put himself through school. Working with small construction companies inspired his passion to help small businesses. After graduation Scott spent 8 years working for a consulting firm that specialized mergers and acquisition for family owned, service-based businesses. Since then, he founded ASG Consulting where his focus is on helping small business owners improve their businesses. When he is not working Scott enjoys camping with his wife and three children and riding dual sport motorcycles.



Julie Shaw, CPA, MBA, CEPA®

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Julie Shaw is an expert financial storyteller. She has nearly forty years of executive finance experience, including twenty-nine years with USA Today Network/Gannett Corporation as Vice President of Finance at the Des Moines Register and the Arizona Republic. Julie's ability to 'explain the story the numbers tell' led Julie to be awarded the Gannett Presidents Ring for Top Executive Leadership five times. Before becoming an entrepreneur and opening Julie Shaw CFO Consulting, LLC, Julie was the Chief Financial Officer for Valley Perinatal Services, which allowed her to witness the challenges and triumphs of running a small business. Julie is a CPA and earned her MBA from Drake University. Julie is also a Certified Exit Planner (CEPA).

Insurance Professionals



Kelly Harding, CIC, AIS

Insurance Professional, The Arizona Group
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32 years' experience in insurance with 18 years at The Arizona Group. I am a generalist with familiarity in insuring all industries as well as some specialization sectors in contractors, restaurants, non-profits and large property risks. We focus primarily on insuring a financial statement by providing products and coverages that could have a large impact to a company's profitability if not insured properly.



Noah Jacobs, WMCP®

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Noah has over 15 years of experience in the life insurance and financial services industries. He serves as the Regional Vice President for Pacific Life's Southwest region in their Independent Financial Planner channel.

Noah partners with independent financial professionals in the Southwest using a proactive consultative approach. His expertise in advanced life insurance solutions can grow financial planning firms, diversify firm revenues and deepen advisor/client relationships. Noah specializes in simplifying creative life insurance strategies to meet the planning needs of high net worth families, executives, business owners, and their professional advisors.

Wealth Managers / Financial Advisors



Kelly Akil, CFP®, CEPA®

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Everything I do is for God's Glory. Growth minded thinking and optimism are the only two things that I allow in my mind. I focus on collaborating with executives, business owners and people who have a net worth of 5 million-plus and who are also growth minded and optimistic. I am an advocate for charitable giving and skilled at strategizing on tax saving methods. My one focus with clients is their ultimate goal! As a child, I was raised around the concept of entrepreneurship and being a good steward of your money. My grandparents came from nothing. However, with hard work and persistence they were able to build in the multi-family real estate industry and retire at the age of 50. They are still living to this day. They were an amazing example to their four children, who went off into the world and went into business for themselves in various industries.



Jason Ayala, CFP®, CIMA®, ChFC®, CEPA®

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Jason, who goes by J, brings more than 20 years of experience — all of them at Ameriprise Financial — helping successful individuals, including business owners and modern families, achieve their financial goals. He specializes in strategic planning for wealth accumulation, preservation and transfer, as well as complex tax and estate strategy, business exit strategy, philanthropic strategy, and executive compensation. He loves helping people and solving problems. He earned his Bachelor of Science degree in finance from Arizona State University. J volunteers his time with Los Ojos de la Familia, serving on the Board of Directors for the organization in New Mexico and President of the Arizona branch. In his free time, J enjoys being with friends and family, golfing, exercising, traveling and scuba diving. He and wife, Jennifer, have a grown son and two canine fur babies, Chico and Maya.



George Henderson

Wealth Advisor, First Vice President - Investment Officer with P.H.X. Wealth Management Group :
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George is a First Vice President - Investment Officer with P.H.X. Wealth Management Group of Wells Fargo Advisors in Phoenix, Arizona. His expertise lies in in-depth investment planning and business exit planning for business owners and uses that expertise and education to marry those plans with a bespoke investment portfolios; using individual equities, options and structure notes to help secure the long term goals of his clients. After years of valuable Military Service from 2002 through 2014, as a Combat Engineer in the Army, George was deployed in support of Operations Iraqi Freedom and Enduring Freedom to conduct route clearance operations and later as a Liaison Officer (LNO). George was awarded a Bronze Star Medal and Combat Action Badge in 2005 for his actions outside of Baghdad, when his patrol came under direct and indirect enemy fire.



Bruce Hosler, EA, CFP®, CPWA®, AIF®, CEPA®, Chapter Vice-President

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Bruce is the founder and principal of Hosler Wealth Management, LLC, with offices in Prescott and Scottsdale and over 28 years of experience. He primarily serves pre-retirees, retirees and widows, using advanced tax strategies to help them move toward a tax-free retirement while preserving their wealth. Bruce is credentialed as an Enrolled Agent, CERTIFIED FINANCIAL PLANNER® professional, and Certified Private Wealth Advisor (CPWA®). He is the author of the book MOVING TO TAX-FREE™ Strategies For Creating Tax-Free Retirement Income And Tax-Free Lifetime Legacy Income For Your Children, and the host of the Protecting and Preserving Wealth Podcast. Recognized as a top financial advisor by Forbes for seven consecutive years, Bruce continues to be honored as a Chairman's Level advisor in 2024, a distinction given to only 4% of advisors at Commonwealth Financial Network. Outside of work, Bruce enjoys spending time with his wife, Laura. He is also an avid golfer who appreciates the sport's challenges and beauty.



Jason Hosler, EA, CEPA®

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Jason works as a financial advisor with clients to implement and administer our wealth management process. He has established himself as a primary service advisor for many of our Prescott clients. He has been with the firm for over a decade. Jason continues to take on many challenging roles in the industry to expand his experience thus guiding him down the path of leadership and higher levels of responsibilities. Jason holds Series 7 and 66 FINRA securities registrations. He brings a technological edge to our firm and helps many of our clients stay current in the fast-moving age of the internet. Jason grew up in Prescott and enjoys all it has to offer. He is an avid outdoorsman and golf enthusiast. He loves spending time with his family, his wife Ashley, daughter Emma, and baby James, the newest addition. He also loves to travel, read, and research the latest updates in technology.



Phil McNulty, CFP®, MPAS®, CEPA®, CRPS, Chapter Vice-President

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Phil has been in the financial services industry since 2010. He is a Master Planner Advanced Studies™ designee, currently the highest professional designation in the financial services industry. He earned this in concert with earning his Masters of Science in Personal Financial Planning in 2018. These studies expanded significantly on the topics he studied while becoming a Certified Financial Planner™ in 2015. Phil believes solid financial planning is the result of understanding each person's unique situation and goals. He is proud to bring years of study and experience to bear on each interaction and works hard to find thoughtful and innovative solutions to every problem. Before working as a Financial Advisor, Phil served two tours in the United States Marine Corps and worked for several years afterward supporting the United States military, both domestically and overseas. He has lived in every time zone in the country and still loves to travel. He believes his diverse background gives him the ability to convey any financial topic into everyday language so his clients can make informed decisions with confidence.



David Moratti, CFP® ChFC® CRPC®

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David is a Partner at The Carter Moratti Group, part of Camelback Retirement Planners, where he brings nearly three decades of financial expertise to the team. Since launching his career in 1995, David has been dedicated to guiding individuals through the complexities of retirement planning and financial transitions. Before joining forces with Chuck Carter, David spent 28 distinguished years at Morgan Stanley, rising to the role of Executive Director. In this capacity, he led top-performing teams in Private Wealth Management and Global Wealth Management across the Philadelphia region, earning him a stellar reputation in the industry. His industry experience and credentials, alongside executive training from the University of Pennsylvania's Wharton School, Thayer Leadership at West Point, and the Family Wealth Director program from Morgan Stanley Private Wealth Management, make him a trusted partner in planning impactful financial outcomes.



Juan Ros, CFP®, AEP®, CSPG, CEPA®, CVGA®

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Juan Ros, CFP®, CSPG, AEP®, CEPA® is a Partner with Forum Financial Management, LP, an independent financial planning and investment management firm with offices nationwide and over \$8 billion in assets under management. Prior to launching his financial advisory practice, Juan held various senior fundraising positions at the Ronald Reagan Presidential Foundation, Occidental College, and the ALS Association, helping to raise millions of dollars in current and deferred gifts. Juan works closely with legacy-minded families and business owners to enhance, protect and help transfer their wealth, particularly when charitable planning is involved.



Tor Saile, MBA, CLU, ChFC®, CLTC, BFA, CEPA®

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Tor Saile is an owner and managing partner of Ironwood Family Wealth Advisors and ClearPath Growth Partners. Ironwood serves clients across the country and the globe. Their team works with entrepreneurs, professionals, business owners, and executives helping them maximize retirement distributions and goal specific financial and investment planning. Tor is joined in the businesses by his two sons, Tyler and Tanner as well as other team members. Prior to his financial services career, Tor had owned, bought and sold a number of companies in a variety of service industries. His broad and varied experiences help him understand what business owners and professionals feel and live every day and his mission is to help his clients mitigate risk and achieve financial peace of mind. He also uses that expertise through ClearPath Growth Partners to help business owners maximize the value of their businesses.



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At Udall Financial, a boutique private wealth management firm, we focus on building strong relationships and prioritizing client education, which sets us apart in the wealth management industry. My roles as the founding member and current president of the Greater Phoenix Chapter of the Exit Planning Institute highlight my commitment to supporting business owners in maximizing the value of their ventures. I am dedicated to managing wealth and empowering clients to achieve their broader life goals. With over 30 years of experience, I am clearly passionate about what I do!



Dr. Sunil Wahal

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Dr. Sunil Wahal is the Jack D. Furst Professor of Finance and Director of the Center for Responsible Investing at the W.P. Carey School of Business, Arizona State University. His research focuses on short and long-horizon investment strategies (momentum, profitability, and others), trading issues (trading algorithm design, trading costs, and high frequency trading), and delegated portfolio management and asset allocation for large institutional investors. His work covers public equities, fixed income, and private equity. He has published extensively in the Journal of Finance, the Journal of Financial Economics, the Review of Financial Studies and numerous other journals. He is a consultant to Avantis Investors (<https://www.avantisinvestors.com/en.html>). Prior to that he was a consultant to Dimensional Fund Advisors (2005-2019). He sits on a number of investment committees. He is a regular speaker at academic and practitioner conferences and has given numerous presentations to sovereign wealth funds, endowments, foundations, family offices, DB plans, DC plans, and registered investment advisors.

Commercial Bankers & Lenders



Natalie Bowers

Vice President, Commercial Banker for BMO:
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With 25 years' experience in the banking industry, Natalie is currently Vice President, Commercial Banker for BMO bank. She is a steward of strategic partnerships for commercial clients; mid-large sized organizations; and nonprofits. Natalie's areas of focus include cash flow management, accounts receivables, accounts payables, fraud services, covenant testing, Treasury Payment Solutions, Cash Management, commercial cards, and more. She is a driven professional who promotes servant leadership and financial awareness within her community.

Charitable Gift Planners



Tiffany House, CAP®, CEPA®, FCEP

Charitable Gift Planning, Tax & Estate Strategist at Exit Preparation, LLC:
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Tiffany House CAP®, CEPA, FCEP, is a tax, estate, and charitable strategist who helps families navigate intricate situations, including selling or transitioning a business, values-based estate planning, tax concerns, and planning philanthropy. She is a fiduciary consultant who collaborates with other advisors to implement planning strategies. Tiffany is a nationally recognized speaker, and she is very active in the community. Her background in the family business of wealth planning for ultra-high-net-worth clients has given her unique experience in tax, estate, and charitable planning strategies.

Valuation Professionals



Ralph Gigliotti, CPA, ABV

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Ralph has nearly thirty years of professional experience and focuses on performing valuations of businesses, business interests, and intangible assets. He has worked with companies ranging from closely held small businesses generating under \$100,000 in revenues to larger, mid-size closely held businesses generating over \$200 million in revenues in industries including manufacturing, distribution, retail, restaurants, construction, professional firms, medical practices, real estate brokerage, auto dealerships, marinas, holding companies, and not-for-profit. He has performed valuations for a variety of purposes including tax planning and compliance, gift and estate tax, mergers and acquisitions, divorce, and shareholder disputes and representation in litigation including plaintiff, defendant, mutual, and court-appointed neutral. Ralph holds a BS in business administration with an emphasis in accounting from Bryant University. He is licensed as a CPA and holds the Accredited in Business Valuation designation from the American Institute of CPAs (AICPA). He is a member of the AICPA and the American Society of Appraisers.