

*Luncheon with*

The Honorable

**Jerome H. Powell**

*Chair of the Board of Governors of  
the Federal Reserve System*

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Thursday, October 19<sup>th</sup>, 2023

11:15 am – Registration and Reception

12:00 pm – Program

1:00 pm – Lunch

**New York Hilton Midtown**

1335 6th Ave

New York, NY 10019

Co-Sponsored by:



## Special Guests

### **James A. Berger**

Jim Berger is a Managing Director with New York Private Bank & Trust. He is responsible for new business development for all divisions and affiliates of Emigrant Bank. Prior to joining New York Private Bank & Trust, Mr. Berger spent 23 years in the global insurance market, specializing in the entertainment industry providing insurance and completion bonds for several Academy Award® winning films. Mr. Berger currently holds several Board seats including the Trust of the Metropolitan Opera, as well as Aperture Media Partners, a business he introduced to Emigrant Bank.

### **Robert Blumenfeld**

Robert (Bobby) Blumenfeld has over 30 years of experience working with business owners in a broad range of industry sectors, including manufacturing, business services, consumer, retail, health care and technology; providing corporate restructuring, investment banking, and mergers and acquisitions services.

Bobby serves as Managing Director of American Industrial Acquisition Corporation ([www.aiac.com](http://www.aiac.com)) acquiring non-core manufacturing businesses across North America, Europe, and Asia.

Bobby is also Managing Partner of the Blumenfeld Financial Group ([www.blumenfeldgroup.com](http://www.blumenfeldgroup.com)) providing growth advisory, restructuring and mergers and acquisition guidance to companies focused in B2B (Business to Business) and B2C (Business to Consumer) industries.

As former Executive Director of ACG New York (2010-2019), Bobby has brought together over 100,000 dealmakers representing in excess of \$100 billion in investable capital. ACG New York is a non-profit financial association in its 68th year whose 1,100 members engage and support one third of the US economy.

### **Tonio Burgos**

With over five decades of business, government, civic involvement and legislative affairs experience, Tonio Burgos brings unique insight and comprehensive understanding of how to get results on behalf of clients. A top-rated consulting and lobbying firm in the tristate region, Washington, DC and Puerto Rico, Tonio Burgos & Associates has successfully worked with clients on a variety of projects in the public and private sector for over 36 years.

Tonio worked for Governor Mario Cuomo for 15 years. Tonio served as a Commissioner of the Port Authority of New York and New Jersey and as a Director of the Trans-Hudson Corporation (PATH). He also served as Vice Chairman of the NJ Economic Development Authority, a Board Member of NY School Construction Authority, as well as the Treasurer of the Camden, NJ Recovery Board.

Tonio has served in many capacities and received numerous honors from charitable organizations and educational institutions. He is a member of the Board of Trustees of the New York City Police Foundation, the Regional Plan Association (RPA) Board, and RFK Foundation. Lehman College awarded Tonio an honorary Doctor of Laws Degree in 2015. He received the RPA's Lifetime Leadership Award and the NJ Alliance for Action's President's Award. In 2017, Tonio received the Citizens Union Gotham Greats Award. In 2019, Tonio became Chairman of the National Parks of New York Harbor Conservancy and New Day at Federal Hall. He has served for over three decades as a member of the Democratic National Committee and a member of the DGA Board of Governors.

## **Arthur Byrnes**

Senior Managing Director, Investment Policy/Portfolio Management (40+ years industry experience, joined Deltec in 1971) Mr. Byrnes manages Deltec Emerging Market Income Fund, L.P. and is ultimately responsible for all aspects of Deltec's emerging markets investment activities, including debt and equity portfolios. He is also actively involved in overseeing many of the firm's investments in distressed credits and high yield securities. Mr. Byrnes is currently a director of The Brazilian American Chamber of Commerce and The Ecuadorian American Association. He received a BA from Harvard College in 1967 and an MBA from Stanford University Graduate School of Business in 1971.

## **Michelle Caruso-Cabrera**

Michelle Caruso-Cabrera has 30 years of experience at the nexus of finance, economic development, and communication. She is currently the chief executive of MCC Productions and a CNBC Contributor.

Caruso-Cabrera was the first Latina anchor at CNBC and the network's first Chief International Correspondent for over a decade. She joined CNBC in 1998 and spent more than 20 years covering economic crises and international markets as well as interviewing presidents, prime ministers, and CEOs. She has reported live from Ukraine, Russia, Venezuela, Iran, Cuba, Greece, Italy, and Mexico, just to name a few. She began her career at Univisión Spanish-language news in 1991, where she

produced stories relevant to the immigrant experience. In 1993, she received an Emmy for a series she co-produced on the AIDS Crisis. Hispanic magazine has named her one of the most influential Hispanics in America. She sits on the International Advisory Board of the Instituto Empresa en Madrid, one of the world's top business schools, and serves as President of the Board of Directors of Ballet Hispánico in NYC. She is a member of the Council of Foreign Relations, the Economic Club of NY, and the Latino Corporate Directors Association. In 2023, she joined the board of directors of Wendy's and Del Real Foods, a portfolio company of Palladium Equity.

## **Margaret Chustecki**

Margaret I. Chustecki, MD, is an Assistant Clinical Professor at Yale School of Medicine. Educated at Warsaw Medical School, she completed her training at Newton Wellesley Hospital and New England Medical Center. Before starting her internal medical practice in 2003, she worked as an Attending for the Hospitalist Service at Yale New Haven Hospital.

Dr. Chustecki completed her MBA program at the Yale School of Management in 2009. This contributed to her developing and leading a medical practice (Internal Medicine of Greater New Haven). Over the years, she was instrumental in acquiring multiple medical practices. Her medical team aims to improve efficiency, performance, and communication with patients and the public. She has implemented a quality program that achieved NCQA accreditation in eligible markets and supported a quality infrastructure for additional programs, such as Meaningful Use and PQRS. She coordinates the team of medical providers to support medical education and collect data to improve patient outcomes, manage costs, and improve healthcare quality. She is the author and co-author of multiple medical publications, including the latest Essential Rationale Healthcare Economics: Past, Present, & Future by New York, Nova Science Publishers, Inc.

As an attending, Dr. Chustecki has taught interns and residents at Yale New Haven Hospitals for many years. She has also taught and supervised medical students, PA students, and residents from YNHH in Internal Medicine of Greater New Haven offices.

In 2015, she co-founded Chase Medical Research of Greater New Haven and started to intensify her research activities. She is currently the chief clinical trial investigator for multi-institutional trials. This work began with a long-term outcome study to assess the effectiveness of adding an investigational drug to a multi-center, randomized, double-blind, active-controlled, parallel-group, and phase III trial. The trial evaluated the

safety, efficacy, and comparison of add-on therapy with different doses of an investigational drug.

She is on the boards of directors and advisory boards of many private and charitable organizations including Avara Pharmaceutical Services, Ltd.

## **Joe DeMartino**

C-level Executive and author, Joe DeMartino has more than 30 years of experience in the Aerospace & Defense and Building Material Supply industries. He is currently CEO of Precision Holdings, LLC and has served in other executive leadership roles as COO, President, or EVP with such companies as Barnes Aerospace, GKN, and LMI Aerospace as well as managed a successful consulting practice for the past 7 years.

Highlighting his record of transformational management include leading diversification and significant global growth at 5 companies, bringing a high-tech business from start-up to maturity, driving multiple M&A ventures, directing major integration and rationalization of acquired businesses, and orchestrating successful turnarounds as well as holding Board positions with 2 organizations. He has led businesses and been responsible for P&L from \$25M to ~\$450M. He served as President of the SSA Board of Directors for GKN Aerospace.

Specializing in the Aerospace & Defense Markets, Joe provides executive coaching and consulting to select professional / corporate and individual clients. He is passionate about helping individuals and organizations eliminate psychological barriers, through innovative strategies to enable them to achieve their highest and their best. He has an insatiable curiosity, a voracious appetite for learning and is driven to teach as part of his life purpose. He loves fitness and nutrition, has owned a fitness center, is currently a NASM CPT / CSNC (National Academy of Sports Medicine - Certified Personal Trainer, Certified Sports Nutrition Coach)

Complementing his leadership roles, Joe is a recent Amazon #1 Bestselling author for his first book (Kona's Tale: A Different Kind of Love Story), founded a successful automotive service and detailing business, developed with a national franchise plan and trademarked prior to successful sale. He currently serves on the Board of Directors of Fathers Families Support Center, St Louis, a nonprofit organization. Proficient in Italian, Joe has extensive international experience in Europe, Japan, and Mexico.

## **Patricia Duff**

Patricia Duff is a prominent political activist, fundraiser for philanthropic causes, and founder of The Common Good, a nonpartisan, nonprofit

organization dedicated to promoting greater citizen participation in civic life and the political process. In the late 1980s, Duff started Show Coalition, a nonpartisan organization focused on the nexus between Washington politics and Hollywood. She has worked on numerous campaigns, including presidential and senate election efforts, and has been an activist for a number of causes. Duff was regularly cited in major publications such as the Washington Post, Los Angeles Times, and elsewhere on politics and was named a “Rising Star” by the Los Angeles Times and as one of the “Women We Love” by Esquire magazine for her work in politics. She is a member of the Council on Foreign Relations, the Board of Advisors for Georgetown University’s School of Foreign Service, PEN America, the National Harbor Conservancy which oversees Federal Hall, and former Presidential appointee to the Board of Trustees of the Library of Congress, among other boards.

## **Olga Figueroa Miranda**

Dr. Olga Figueroa-Miranda is the Associate Director for Business and Education Development at the Florida Space Institute (FSI), University of Central Florida (UCF). Her role involves developing innovative outreach, educational, and workforce programs, as well as cultivating new business opportunities for FSI’s growth.

Previously, she served as the Site Director of The Arecibo Observatory in Puerto Rico under UCF’s management, making her the first Puerto Rican woman in this role. She successfully oversaw the observatory’s transition phase. Dr. Figueroa-Miranda is also involved in the international collaboration Aula Maria Zambrano of Transatlantic Studies.

Her work focuses on coordinating local and international projects with educational, cultural, scientific, environmental, and community significance. Notable projects include Las Cucharillas Marsh, the Geosciences Project, and others that have positively impacted students, teachers, communities, and the environment.

Dr. Figueroa-Miranda holds a PhD in Education from the University of Almeria in Spain and has a background in project management and business administration from Universidad Ana G. Mendez.

## **Dennis Flannery**

Dennis Flannery’s career has spanned more than 55 years from early military service through formative and senior executive positions with leading global firms in commercial, investment and development banking almost exclusively in emerging markets. Interspersed among private

sector postings have been advisory and diplomatic assignments with the U.S. government.

## **Richard Fontaine**

Richard Fontaine is the Chief Executive Officer of the Center for a New American Security (CNAS). He served as President of CNAS from 2012-19 and as Senior Fellow from 2009-12. Prior to CNAS, he was foreign policy advisor to Senator John McCain and worked at the State Department, the National Security Council, and on the staff of the Senate Foreign Relations Committee. Mr. Fontaine currently serves as Executive Director of the Trilateral Commission, on the Defense Policy Board, and as a Sine Institute Fellow at American University. He has been an adjunct professor in the Security Studies Program at Georgetown University's School of Foreign Service.

## **Ed Grebow**

Dennis Flannery's career has spanned more than 55 years from early military service through formative and senior executive positions with leading global firms in commercial, investment and development banking almost exclusively in emerging markets. Interspersed among private sector postings have been advisory and diplomatic assignments with the U.S. government.

## **Matt Hurlock**

Matthew Hurlock is currently the Chief Administrative Officer and General Counsel of Currency Reserve Bank, a Connecticut bank. He was previously a partner at the law firm White & Case, LLP, in New York. He has been practicing law and involved in financial services for over 30 years in Europe, Asia and Latin America. Mr. Hurlock also worked at the World Bank in Washington, DC, and the European Bank for Reconstruction and Development (EBRD) in London.

## **Yves Istel**

Mr. Istel is in his seventh decade in finance and investment banking, and he is currently a Senior Adviser to Hanseatic LLC. His career leadership roles include Vice Chairman of Rothschild & Co from 1993 to 2002, where he served as a Senior Adviser and a member of its Global Advisory Compliance Committee. He also held the position of Chairman International at Wasserstein, Perella International from 1988 to 1992, Co-chair at First Boston International from 1984 to 1988, and Managing Director, Executive Committee member, and Board Member at Lehman Brothers from 1978 to 1984.

In addition, Mr. Istel served as a Director for over 30 years, then Deputy

Chairman of Richemont, and for 10 years as a Director of Analog Devices.

He has always maintained wide-ranging interests beyond the business world, often with a French-American focus. He served as Chairman at NYU for both the French Center and the Remarque Institute.

Currently, he is an active Director and founder of the French American Foundation, Action Against Hunger US, and Libraries Without Borders US. He also chairs the Fondation Saint John Perse and is a member of the Council on Foreign Relations and the Board of Advisers for Innova Health Partners.

Mr. Istel earned a BA in economics from Princeton University, where he is a member of the President's Council. He has been awarded the titles of "Commandeur de la Légion d'Honneur" and "Officier des Arts et des Lettres" by the French Government.

## **Dennis Jean-Jacques**

J.Dennis Jean-Jacques serves as Founder and Chief Investment Officer at Ocean Park Investments LP. He is an accomplished and seasoned investor having invested approximately more than \$3.2 billion of client capital in the US and European public markets during various market cycles over 20 years. For a decade, prior to Ocean Park, Mr. Jean-Jacques was a Managing Director and portfolio manager at alternative platforms including Verition Fund. Prior to running low net, alternative strategies, Mr. Jean-Jacques was an investor in the Public Equities Division at Olayan Investment Group and apprenticed at Mutual Shares focusing on companies undergoing or likely to undergo significant change, dislocations and other unique special situations with a strategy and asset mix consisting of domestic and foreign equities, arbitrage positions, shareholder activism and bankruptcy positions. For ten years,

Mr. Jean-Jacques served as a board advisor and as an actively engaged shareholder in several campaigns including in the operational restructuring of a global industrial company, the outright sale of an American appliance manufacturer, and, at the boardroom level, helped lead the break-up of an S&P 500 conglomerate where his work was profiled in BARRON's, Business Week and The Wall Street Journal. Mr. Jean-Jacques is also an author on portfolio construction, valuation and risk management where his published work, "The Five Keys to Value Investing" is used at many universities and has been translated into three languages including Mandarin Chinese. He began his investment career at Fidelity Investments in equity research in 1993. Mr. Jean-Jacques



received a BSSE from Boston University College of Engineering and an MBA from Harvard Business School.

## **Karim Kanji**

Karim N. Kanji is president and chief executive officer of Sutter Hill Properties. Sutter Hill is a real estate investment, development and property management company founded in Toronto, whose roots go back to 1992, with properties in five Canadian provinces and the United States. While at Sutter Hill, Karim has transacted over \$1.3B of office, retail, industrial and multifamily properties in North America.

Mr. Kanji, a noted philanthropist sits on the boards or has been involved with several arts, political and charitable organizations, including the Junior Achievement of Central Ontario, Workman Arts, Princess Margaret Hospital Foundation, Royal Conservatory of Music, Glenn Gould Foundation, Seventh Stage Theatrical Productions. In addition, he is also a board member and Vice President of the North Atlantic Treaty Organization (NATO) Council of Canada.

## **Yosuke Kashii**

Yosuke Kashii serves as a senior Japanese business representative at Marsh, the world's largest risk and insurance advisory firm and a group company of Marsh & McLennan (Ticker: MMC). His responsibilities include Japanese relationship business development and collaboration with Marsh's major partner insurance markets in Japan and the United States.

Before his current role, Yosuke led various segments in Japan, overseeing more than 30 direct reports and the profit and loss of each segment. He previously managed the corporate segment targeting middle-market clients and served on the board of directors for a subsidiary after Marsh Japan acquired an independent insurance brokerage in March 2018.

## **Bukhtiar Khan**

Presently Mr. Bukhtiar J. (Bucky) Khan is working at Paper Excellence Group as Vice President, Investor Relations-Capital Rise and Investments. Reporting into the President and CIO he is primarily focused on raising capital for corporate acquisitions (take private/LBOs), construction of new plants and transformation/upgrade of existing plants at Paper Excellence Group. In addition, work extensively with project teams internally on the investment thesis for any particular transaction for internal stakeholders. Also engaged with Founder's Family Office platform for capital raise for the other investment strategies outside off Pulp & Paper.

Mr. Khan worked at BNP Paribas USA, since June 1992 to June 2021, last holding the title of Managing Director and Deputy Head of Leverage Finance-Americas (Jan 2019-June 2021). Previously, Bucky held the position of Managing Director and Head of Structured Debt Origination, while working at BNP Paribas SA. Bucky held this role for 4 years (May 2015 - January 2019). Before this, Bucky held the position of Head of Merchant Banking Group (Private Debt/Direct Lending), while working at BNP Paribas SA. Bucky occupied this position for 5 years (January 2010 - February 2015). Previously, Bucky held the position of Head of Loan Sales & Trading for Americas and Head of HY Sales & Cash Trading, while working at BNP Paribas SA. Bucky held this role for 3 years (May 2007 - January 2010). Before this, Bucky held the position of Co-Head of Syndication, Trading, & Placement Group, while working at BNP Paribas SA. Bucky occupied this position for 10 years (January 1997 to February 2007).

## **Barclay T. Leib**

Barclay T. Leib is a Wilson Scholar graduate of Princeton University's School of International and Public Affairs. He has managed Sand Spring Advisors LLC as an alternative asset and financial investigative firm for the past 24 years, mostly serving the family office community. He holds Chartered Alternative Investment Advisor (CAIA) and Certified Fraud Examiner (CFE) credentials together with active FINRA Series 7, 63, and 65 licenses. Over the past seven years, Mr. Leib has regularly assisted the SEC and CFTC to uncover and investigate issues of financial sector malfeasance, and he has served as an Expert Witness in various litigation matters involving hedge funds, securities manipulation, proper due diligence, and fiduciary duty. Mr. Leib spent the first twenty years of his career working in currency and commodity derivatives markets as a senior portfolio manager first at JP Morgan and later at Goldman Sachs, Barclays Bank, and Societe Generale. At the suggestion of litigator S. Hazard Gillespie, Mr. Leib also spent one early summer working as a paralegal within Davis, Polk & Wardwell – a firm with which Mr. Jerome Powell was also affiliated early in his career.

## **Leonard M. Levie**

Leonard M. Levie is Chairman and Founder of American Industrial Acquisition Corporation ([www.aiac.com](http://www.aiac.com)), and each of its affiliates and foundations. He also serves as Chairman of the AIAC-Koch Industries joint venture, Liquid Cooled Motors.

Mr. Levie is a Member of the Board of Trustees of the Explorers Club, the Forest Products Association of Canada, and the Pharma & Biopharma

Outsourcing Association. He is a Member of the Trilateral Commission, the Bretton Woods Committee, the Patrons Circle of the Japan Society and the Economic Club of New York Legacy Society. Mr. Levie is a Member of the Center for a New American Security's Council and its Leadership's Circle and is a Fellow of the Asia Society, of the Royal Society of Arts, Manufactures, and Commerce, and of the Royal Geographical Society.

He has served as a guest lecturer at Harvard Business School, Yale School of Management, the University of Chicago Graduate School of Business, the Association for Corporate Growth, and the Turnaround Management Association.

He is a Member of the Dean's Council of the John F. Kennedy School of Government of Harvard University, the Oliver Wendell Holmes Society of Harvard Law School, the John C. Whitehead Society of Harvard Business School.

Mr. Levie was awarded the Turnaround Management Association's 2017, 2018, and 2019 Turnaround of the Year Awards for the revival of Vermont Aerospace Industries, Canadian Kraft Paper Industries, and Union Metal Industries.

## **Emily Lodge**

Emily and her husband, Robert Pingeon, held several prominent roles in the insurance and financial industry, including serving as the Head of European Underwriting for Chubb, President of Chubb France, President of Cigna France, and CEO of Mestre Associates in Europe and the Middle East.

She, on the other hand, is a former journalist and the author of two notable books. The first, titled "The Lodge Women, Their Men, and Their Times," offers insights into the lives of fascinating individuals. Her second book, "The Falcon Diaries: an American in Jordan," chronicles their experiences during eight years of living in Jordan. Currently, she is actively engaged in crafting a new novel.

## **Robert Pingeon**

Robert Pingeon is the president of Mestre, Inc. a U.S. Delaware registered company, which operates as a consultancy in the Middle East. Mr Pingeon lives in and works out of Amman, Jordan. Mestre has consulted with large and midsize companies on projects relating to infrastructure and financial services in Iraq since 2003. Most of his work is related to Iraq. Notable clients have included: Siemens, Schneider

Electric, Kohler Corporation, Vatech, Elliott Management, Power Really, Louis Berger, and Shamara Group. Prior to moving to Jordan Mr. Pingeon worked from Paris France as a senior executive for American Insurer Chubb Corporation and later the CIGNA insurance group with responsibilities for their European operations. He has a BA in journalism from the Boston University School of Communications and an MBA in finance from NYU's Stern School of Business.

## **Ron Quintero**

Ron has more than 35 years' experience in mergers & acquisitions, valuations, and financial restructuring. He has served more than 750 clients of all sizes in a diversity of industries. Ron is an award-winning lecturer, writer, and scholar who has taught more than 10,000 professionals and graduate school students in more than 60 cities throughout the U.S., and on 5 continents and more than 20 countries outside of the U.S. He has also testified as an expert witness on more than 85 occasions in courts throughout the U.S.

## **Carlos Rodríguez-Pastor**

Carlos Rodríguez-Pastor is the founder and chairman of Intercorp and the founder and General Partner of Nexus Group. Intercorp and Nexus Group primarily operate in Peru and the Andean region, holding a portfolio of companies in sectors such as financial services, retail, real estate, education, healthcare, entertainment, and plastic packaging.

Carlos Rodríguez-Pastor also serves as Co-Chairman of the International Advisory Council of the Americas Society/Council of the Americas. He is a member of the Board of Directors of Dartmouth College and the Board of Directors of the New York Public Library. Additionally, Mr. Rodríguez-Pastor is actively involved in various educational projects and is a co-founder and Chairman of the Board of Innova Schools.

He graduated with a degree in Social Sciences from the University of California, Berkeley, in 1983 and earned an MBA from the Amos Tuck School of Business at Dartmouth College in 1988.

## **Faanya Rose**

Born in Southern Africa, she spent her early years in Victoria Falls, Rhodesia (now Zimbabwe) before relocating to the UK in 1980. In London's financial center, she forged a successful career that left an indelible mark.

Her professional journey included serving as the Group Treasurer of the British Airports Authority during the privatization era under Margaret

Thatcher's leadership. Additionally, she held a position on the Board of Heathrow Express. Her financial acumen also benefited the London Ambulance Service, where she served as a Financial Advisor. Notably, she was appointed by Lord Rabbi Jonathan Sacks to the Jewish Association of Business Ethics Committee.

Beyond her achievements in the corporate world, she dedicated her time to the not-for-profit sector. She assumed the role of Chair at the British Eye Research Foundation and played a pivotal role when it merged with Fight for Sight, the largest eye research charity in the UK, eventually becoming its President. In a historic achievement, she became the first woman and first British citizen to hold the prestigious position of President at The Explorers Club in New York. Her deep involvement in exploration and scientific discovery is exemplified through her active participation in numerous programs offered by the Club.

## **Richard Ross**

Richard A. Ross recently worked with several family offices in NYC and Dubai, for which he has developed innovative factor analytics technology and cryptocurrency portfolio models, and was also recently a mentor at SOSV/DLabs blockchain incubator and at MIT DeltaV technology incubator in NYC.

He holds several patents in the area of wirespeed parsing of text and financial data. He has been the founder of several technology startups in the past.

Rick founded Telemedia Devices, the inventor of "FreezeDry" space-optimizing Java system (acquired by HP); Notable Technologies, a Kleiner, Perkins-backed developer of software for pen-based computing; and Bravo Technologies, developer and publisher of the award-winning spreadsheet for the Mac, MacCalc, as well as the MacGraphX graphing program, and SPAMM, a software accelerator. He started his career as the second engineer on Lotus 1-2-3, and invented the "natural order recalculation" technology, which made 1-2-3 the fastest spreadsheet of its day.

Rick has also consulted to diverse organization, including Bridgewater Associates, where he worked in Research Technology, developing systems to support macroeconomic research; Six Telekurs, on behalf of Gartner, where he performed "technical deep dive" on STK's new market data system; State Street, implementing portfolio analytics on trillion-dollar portfolios; and Morgan Stanley and Merrill-Lynch, where he developed innovative pub-sub systems.

Rick was also involved with "Committee to Establish the National Institute of Finance," which became Office of Financial Research under Dodd-Frank, and has served as Governor's representative on CT Investment Advisory Committee, which oversees CT's \$40Bn public pension fund.

Rick has degrees in Computer Science from MIT in Cambridge, MA, and participated in MIT's Technology and Policy Program; as well, he received a Certificat de Cuisine from Cordon Bleu in Paris.

## **Wilbur L. Ross**

Wilbur L. Ross, Jr. was the 39th Secretary of Commerce. He was the former Chairman and Chief Strategy Officer of WL Ross & Co. LLC and has over 55 years of investment banking and private equity experience. He has restructured over \$400 billion of assets in the airline, apparel, auto parts, banking, beverage, chemical, credit card, electric utility, food service, furniture, gypsum, homebuilding, insurance, marine transport, mortgage origination and servicing, oil and gas, railcar manufacturing and leasing, real estate, restaurant, shipyard, steel, textile and trucking industries. Secretary Ross has been chairman or lead director of more than 100 companies operating in more than 20 different countries.

Named by Bloomberg Markets as one of the 50 most influential people in global finance, Secretary Ross is the only person elected to both the Private Equity Hall of Fame and the Turnaround Management Hall of Fame. He previously served as privatization adviser to New York City Mayor Rudy Giuliani and was appointed by President Bill Clinton to the board of the U.S.-Russia Investment Fund. President Kim Dae-jung awarded Secretary Ross a medal for helping South Korea during its financial crisis and, in November 2014, the Emperor of Japan awarded him the Order of the Rising Sun, Gold and Silver Star.

As a philanthropist, Secretary Ross has served as Chairman of the Japan Society, Trustee of the Brookings Institution and Chairman of its Economic Studies Council, International Counsel Member of the Musée des Arts Décoratifs in Paris, Trustee of the Blenheim Foundation, President of the American Friends of the Rene Magritte Museum in Brussels and Director of the Palm Beach Civic Association. He also was an Advisory Board Member of Yale University School of Management.

Secretary Ross is a graduate of Yale University and Harvard Business School (with distinction). He and his wife Hilary Geary Ross have four children, Jessica Ross, Amanda Ross, Ted Geary and Jack Geary.

## **Frederic Rossi**

Frédéric ROSSI is a seasoned professional currently serving as the Director for North America (USA and Canada) at Business France, a public agency dedicated to facilitating the internationalization of the French economy. With over a decade of experience at Business France, he brings a wealth of expertise in promoting French companies' growth on the international stage and attracting international investors to France. Frédéric is deeply committed to strengthening economic ties between the U.S., Canada, and France. His recent LinkedIn activity reflects his active engagement in forums and events, as well as his focus on fostering collaboration and investment opportunities. His extensive career also includes roles as Deputy General Manager and Director for Singapore and ASEAN-Oceania, where he played a crucial role in supporting French businesses in their international expansion. Frédéric holds an IEP diploma in Eco-Fi from Sciences Po Toulouse and a DEA in International Economics from Paris-Pantheon-Assas University.

## **Gil Roth**

Gil Roth is the President of the Pharma & Biopharma Outsourcing Association (PBOA), a nonprofit trade group that advocates for the legislative, regulatory and general business interests of biopharmaceutical contract service providers. He founded the PBOA in 2014 and has been involved in this sector since 1999.

## **Mark C. Russell**

HyperSciences Founder & Chief Executive Officer - Astronaut. Miner. Mark led Crew Capsule development for Jeff Bezos' Blue Origin human space company and is slated as a suborbital astronaut. He holds a Master Degree in Aero/Astro Engineering from Stanford and is a National Fellow of The Explorers Club. Mark has a long family history operating publicly traded copper and gold mining development companies and is now building the world's fastest mining and tunneling technology using Hypersonic impact. He is leading the world's first companies focused on both industrial and space-related hypersonic applications.

## **Jeremie Sautter**

Since 2020, Jeremie accompanies foreign investors' industrial development projects in France, with the collaboration of all government levels in France, from national ministries/agencies to local/regional stakeholders. Services include site selection, R&D/technology partnerships, recruitment, acquisition opportunities, subsidies, legal/tax/regulatory information, and more. Jeremie has a background in economic development (2000-2012 New York State Economic Development Zone Coordinator, helped industrial SMEs invest \$150M and create 3000 jobs) and networking (2012-2020 membership director

at the French-American Chamber of Commerce in New York, led networking services for 1000 professionals in the areas of technology, finance, food & beverage, luxury & fashion, and sustainability).

## **Ofer Shapira**

Ofer Shapira, Esq. is the founder and CEO of Soteria Market, a secondary marketplace for private credit and distressed assets. Utilizing AI and data analytics, Soteria discreetly matches banks and other financial institutions with the most qualified buyers for various types of distressed or illiquid assets. This maximizes asset value, minimizes trading costs, and significantly enhances process efficiency for both sellers and buyers. Additionally, the platform provides real-time benchmarks for pricing these illiquid assets. Mr. Shapira holds a LL.M (cum Laude) from Tel Aviv University and MBA from NYU, LSE, and HEC. Originally an esteemed bankruptcy lawyer from Israel and an expert in distressed asset management, he transitioned to technology and is now spearheading the mission to modernize the traditional workout and trading processes for illiquid debt, making them data-driven and systematic.

## **Brian Shiau**

Brian Shiau is the VP of Global Strategy and Mergers & Acquisitions at Paper Excellence, a holding company of pulp, paper, and lumber manufacturing businesses with \$11 billion combined revenue and over 20,000 employees. He leads the North American corporate development team. Previously, Mr. Shiau worked at American Industrial Acquisition Corporation, leading acquisitions of distressed industrial manufacturers. He earned his MBA at Yale University and BA at Princeton University.

## **David Stringer**

David Stringer joined Lakewood Advisors as an Associate in September 2021. Having grown up in NYC he has a strong interest in sports and the legal world around it. He is a graduate of Duke University and Brooklyn Law School and was admitted to the NY State Bar in December 2021.

## **Wolfgang Traber**

Wolfgang Traber is chairman and founder of Hanseatic Corporation. Hanseatic is a closely held private investment company, incorporated in 1980, with offices in New York and Hamburg. From 1967 through 1979, Mr. Traber held various senior executive positions with Deltec Panamerica S.A., a Latin American merchant bank. During that time, he lived in Buenos Aires, London, and New York. Mr. Traber was born in Germany in 1944 and was raised and educated in Hamburg.



## **Hugh Verrier**

Hugh Verrier is the former Chairman of White & Case LLP, a global law firm with 39 offices in 26 countries.

With White & Case for 34 years, Hugh has been Chairman since 2007 and directs the Firm's strategy and operations around the world.

A New York-qualified lawyer, Hugh spent most of his career with White & Case overseas in Indonesia,

Turkey and Russia, where his practice was focused on the development of natural resources.

Hugh has law degrees from the University of Ottawa and Harvard Law School. He clerked for Justice Bertha Wilson, the first woman to serve on the Supreme Court of Canada.

## **George Walker**

George Walker, Esq., is a business lawyer who advises companies in the negotiation and federal tax implications of their domestic and cross-border transactions. His for-profit clients are either partnerships or incorporated entities, and may stand alone or be structured in tiers and subsidiaries. Prior to focusing on transactional matters, George began his legal career with a heavy focus on international disputes that pitted private companies against sovereign governments, usually in breach-of-contract claims headed for arbitration governed by specified treaties. As an undergraduate, George graduated with honors in French Studies from the University of Pennsylvania before obtaining law degrees in international commerce and federal taxation from the University of Fribourg (Switzerland) as well as from Georgetown University, where he serves as an adjunct professor of law." His affiliation with AIAC focuses on acquisitions involving francophone North Africa and Europe.

## **Janet L. Walsh**

Dr. Janet L. Walsh is the CEO and President of Birchtree Global, LLC, and Birchtree Performance HR. Birchtree Global provides the legal, financial, tax, and HR expertise to guide business leaders in international expansion. Birchtree Performance HR advises presidents, finance, and HR VPs on increasing corporate top and bottom-line financial performance through HR operations.

Dr. Walsh has worked in and established business operations in 82 countries and all 50 US States. She has been Vice President and Director in Fortune 500 multinationals. She is a noted thought leader and speaker in global market entry, global human resources, and financial performance. Her current research includes HR contributions to financial

performance in the Dow 30, financial issues in high performance workplaces and organizational consequences of bullying. She and her team have won the outstanding research award at the 2019 and 2023 Global Conference on Business and Finance.

She serves on The Explorers Club Board of Directors as Chair of Ethics and Governance, the Human Resources Certification Institute where she sits on the Finance Committee, the Bedford Film Board and the Manhattanville College Corporate Educational Advisory Board.

Dr. Walsh is an amateur archeologist. She found a native American work camp on Pumpkinvine Creek in North Georgia. She has worked on multiple archeology and paleontology projects in the US and overseas. She is an award-winning watercolorist whose paintings have hung in the Booth Museum of Western Art, the largest Western Art Museum in the US. A competitive equestrian, she regularly competes in cross country events, winning the 2021 division championship in the 50th anniversary of the Peekskill Rotary Horse Show.

Dr. Walsh holds a BA in Economics from Bucknell University with a minor in Japanese, an MBA from Loyola University and a DBA from the University of Phoenix. She is an adjunct professor of global business at Columbia University, Fairfield University, and NYIT.

## **Miner H. Warner**

Miner H. Warner is the Chairman of Public Resources International, a New York boutique firm established in 1992 specializing in restructuring of international defaulted debt. Previously, I spent two decades in international corporate finance with Salomon Brothers and Merrill Lynch in New York and London.

## Acknowledgments

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Our heartfelt appreciation goes out to all who have contributed to making this luncheon possible. We extend our gratitude to the event organizers, sponsors, and volunteers for their unwavering dedication.

For inquiries or additional information, please contact us:

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