

Deals & Succession Conference



2026 Speakers and Subject Matter Experts

NAME	TITLE	COMPANY
Aaron Hasler	Co-Founder and Managing Partner	Spruce Rock Capital
Amy DeTolla	CEO	Aureus Advantage
André Martin, PhD	Organizational Psychologist and Author	
Andrew May	Director, Financial Institutions Group	Synovus
Ben Littman	Founding Member, Corporate Development	Pure Financial
Bill Hobbs	Managing Director, Financial Services Consulting	Ernst & Young
Brooks K. Hamner	Senior Vice President	Mercer Capital
Brandon Kawal	Partner	Advisor Growth Strategies
Brian Lauzon	Managing Director	Colchester Partners
Cameron Passmore	CEO	PWL Capital Inc.
Chris Kerckhoff	President and CEO	Plancorp Wealth Management
Christopher C. Frieden	Partner	Alston & Bird
Eamon M. Verdone	M&A Director	Savant Wealth Management
Gordon Ross	President	DeVoe & Co.
James Hughes	Managing Director	Live Oak Bank
Jeremy Enos	Director of M&A	The Mather Group
Jessica Polito	Founder & Principal	Turkey Hill Management
Jim Scanlan	President	Apella Wealth
John Charles Kernodle	President	Strathmore Capital Advisors
Kevin Reilly	CFO and Head of M&A	Parkwoods Wealth Partners
Kim Kovalski	Managing Director	MarshBerry
Kyle Campbell	SVP of Corporate Development	OneDigital
Kyle Miller	Chief M&A Partnerships Officer	EP Wealth
Martine Lellis	Executive Managing Partner, M&A Partner Development	Mercer Advisors
Matt McGinness	Senior Business Consultant	The Ensemble Practice
Nate Pratt	SVP, Corporate Development	OneDigital
Patrick Collins Jr.	CEO	Greenspring Advisors
Paul Lally	Chief Growth Officer & Head of Consulting	MarketCounsel Consulting
Peter Nesvold	Managing Partner	Nesvold Capital Partners
Phil Jacobson	Managing Partner - M&A	Rise Growth Partners
Ranie Verby	Director of Practice Management	Plancorp Wealth Management

Deals & Succession Conference



NAME	TITLE	COMPANY
Rebecca Daves	Senior Consultant	Advisor Growth Strategies
Ryan Griffin	Director, M&A	Beacon Pointe Advisors
Ryan Halls	Co-Founder	HUE Partners
Sara Baker	EVP, Mergers & Acquisitions	Allworth Financial
Sonia Vergel	Managing Director	Focus Financial Partners
Tina Hohman	Director	MarshBerry
Tom Orrechio	Chief Executive Officer, Wealth Manager & Principal	Modera Wealth Management
Tom Valverde	Managing Director	DeVoe & Co.
Wayne Hewett	VP Investment Advisory Lending	Live Oak Bank
William Salmen	Head of Mergers and Acquisitions	Bluespring Wealth
Zachary Huneycutt	Chief Investment Officer	Strathmore Capital Advisors
Zachary Milam	Vice President	Mercer Capital

DIMENSIONAL SPEAKERS

Catherine Williams	Global Head of Practice Management
Andrew Keiper	Head of Enterprise Group
Mark Gochnour	Head of Global Client Services
Stephen de Man	Regional Director and Vice President
Livia Ramirez	Regional Director and Vice President
Susan Rosenhoffer	Regional Director