



Corporate Advisory Board

The mission of the Corporate Advisory Board is to support the Greater Illinois Chapter in achieving the Cystic Fibrosis Foundation goals by serving as ambassadors and advocates as well as recruiting other highly motivated individuals that will actively participate and network on behalf of Cystic Fibrosis.

Co-Chairperson: Lou DeFalco, CPA, Senior Manager, PricewaterhouseCoopers LLP - Lou is a Senior Manager in the Assurance Practice and has more than 9 years of public accounting experience. Lou has spent the majority of his career serving financial services clients with an emphasis on both public and private commercial real estate companies and asset management firms. He has extensive experience with fair value measurements, particularly real estate investments, private equity investments and related debt instruments. Throughout his career, Lou has been involved with internal risk and quality review assignments related to national PwC engagements and he is a frequent instructor for internal and external continuing education programs. Lou's current clients include: CenterPoint Properties Trust; LaSalle Investment Management; Bank of America; and Ridge Realty. Lou is a member of the AICPA. Education: B.S. Business Administration: Accounting, University of Illinois

Co-Chairperson: Tim Fallon, CIMA®, Managing Director, Marquette Associates, Inc. - Tim serves as the primary consultant on several of the firm's relationships. In addition to client relationships, Tim coordinates and oversees the Eleemosynary Services Team at Marquette. Tim is a member of the CFA Society of Chicago. Education: B.S. Business Administration: Finance, Marquette University.

Kathryn B. Ashton, Sonnenschein Nath & Rosenthal LLP -
Bio coming soon.

Michael Barnett, Senior Vice President, Wachovia Bank, a Wells Fargo Company - Michael is a Senior Vice President at Wells Fargo Bank (Wachovia). He is a senior-level commercial banker with 16 years of success holding leadership, business development, client management and risk management positions covering Middle Market and Mid-Corporate companies in the Greater Washington, D.C. and Chicago Metropolitan markets. Michael previously built and led Citibank's Mid-Corporate commercial banking enterprise in the Midwest before moving to the Washington, D.C. area to work as a Senior Risk Officer at Wachovia. He graduated with a B.A. from Washington University in St. Louis and earned an M.B.A. from the University of Illinois at Champaign-Urbana.



Corporate Advisory Board

Brennan Barthelemy, Vice President, Sterling Partners – Brennan Barthelemy is currently a Vice President at Sterling Partners, a private equity firm with over \$4B of capital under management. Sterling makes strategic investments in the industries of for-profit education, healthcare services and business services. With over 13 years of recruiting experience, Brennan is the head of Talent Acquisition for the firm and has responsibility for all CEO and C-Suite recruiting for the entire portfolio of companies. Originally from Texas, where she was previously involved with the Dallas Chapter of the Cystic Fibrosis Foundation, she received a Bachelor of Arts degree in Public Relations from Texas Tech University.

Ed Bauer, President, Screen Concepts, Inc. - Genius Retractable Screen Systems - Ed received his B.S. degree in marketing from the University of Illinois. He is a retired USAF Capitan where he served in the SAC as a pilot, and both base and missile communications officer. Ed is also a retired Motorola, Inc. executive. His 30 year career focused on business development and distribution. Early on he set up and managed the Motorola cellular, direct distribution team throughout the US. He also created, established and directed the Motorola public safety, two-way radio, systems integration business in the US. This began with strategic planning, integration of all business components, customer sales, systems implementation, and customer systems training and service. He was also involved in Motorola's entry into the global smartcard systems business. Ed is a State of Illinois, licensed, real estate sales person. He is also presently involved in several other strategic business planning activities.

Robert J. Gaetano, Accenture –
Bio coming soon.

Andrew Golden, CIMA, Deloitte Investment Advisors - Andy is an Investment Consultant for Deloitte Investment Advisors. Andy has over 11 years of industry experience serving both high net worth individuals and institutional clients. Prior to joining Deloitte, Andy worked for JP Morgan in Private Banking and Capital Markets. Andy is a member of the CFA Institute and the Investment Management Consultants Association. Andy is a graduate of Marquette University.

Richard Gray, Partner, Jenner & Block – Richard J. Gray is a Partner at Jenner & Block's headquarters office in Chicago, IL, where he works in complex civil litigation, including intellectual property, antitrust, insurance coverage and class action matters. Mr. Gray was recently named an Illinois "Super Lawyer" in the field of intellectual property litigation by *Law & Politics*, and was also recognized as one of *Lawdragon* magazine's "500 Leading Lawyers in America." Mr. Gray is AV Peer Review Rated, Martindale-Hubbell's highest peer recognition for ethical standards and legal ability. Mr. Gray has



Corporate Advisory Board

served on the CF Foundation Greater Illinois chapter's Board of Directors and is chair of its *Milestones to a Cure* Steering Committee. He graduated from the University of Michigan in 1971, and he received his J.D. from the University of Michigan Law School in 1974. Mr. Gray resides in Barrington, IL with his wife, Pamela. Their family has been touched by CF.

Karma Israelsen – Bio coming soon.

Dave Karwowski, Director of Marketing for Bonneville Chicago Radio Group - Now in his 10th year as Director of Marketing for the Bonneville Chicago Radio Group, Dave Karwowski has been a part of the Chicago Radio landscape for over two decades. A 1997 graduate from The University of Wisconsin-Platteville with a degree in Communications, Dave got his start in Chicago Radio at Classic Rock outlet WCKG. His 20 year career has included stints at WSCR/WXRT, WLUP/W MVP and WXXY/WKIE. Dave is a three time nominee for Hot AC Marketing Director of the Year by The Radio Music Awards. In 2007, Dave was awarded the prestigious "Bonneville's Best" award given to individuals for their outstanding contributions to Bonneville International Corporation.

Kati Kaup, Senior Sales Manager, Hilton – Bio coming soon.

Brian P. Kerwin, Duane Morris LLP – Bio coming soon.

Jennifer Durham King, Vedder Price P.C. – Jennifer Durham King is an attorney and a shareholder of Vedder Price PC, and Co-Chair of the firm's Capital Markets Practice Group. Ms. King concentrates her practice in capital markets and corporate securities transactions, with a focus on financial institutions, representing public companies and underwriters in a broad range of capital markets transactions, including public and private debt and equity offerings, trust preferred offerings, mergers and acquisitions, and capital planning and formation. She also counsels public companies on their reporting and disclosure obligations under the federal securities laws, as well as on a variety of corporate governance, shareholder and board of director matters. Prior to graduating from law school, Ms. King spent ten years in the brokerage industry, working as a securities broker with a Wall Street firm and a large Chicagoland community bank, as well as a sale representative for a regional sponsor of unit investment trusts, holding both the FINRA Series 6 and Series 7 licenses. Ms. King graduated from Miami University, Oxford, Ohio, with a B.A. in Political Science, and from Chicago-Kent College of Law, Chicago, Illinois.

Clark Koertner, Segall Bryant & Hamill – Mr. Koertner is primarily responsible for the distribution of Segall Bryant & Hamill's portfolios to



Corporate Advisory Board

institutional clients and investment consultants. He has 7 years of institutional investment experience. Prior to joining Segall Bryant & Hamill, he was a consultant at Stratford Advisory Group, Inc and Mercer Investment Consulting, Inc. Mr. Koertner's efforts focused on asset allocation, manager research decisions and investment policy formulation. Mr. Koertner is a graduate of Miami University's Robert T. Farmer School of Business where he attained a B.S. in Finance and Management Information Systems.

Mike Kolassa – Bio coming soon

Jeff Mengel, CPA, Partner, Plante Moran – Jeff specializes in working with clients in the manufacturing and distribution industries. He has over 29 years experience in operational and strategic planning, inventory control, scheduling, forecasting and costing, as well as tax planning and financial statement preparation. Jeff has authored numerous articles and spoken on multiple occasions on effective strategies for manufacturers and distributors. Jeff is a member of multiple professional organizations. Education: B.S. Business Administration: Accounting, Michigan State University, graduated with honors.

Mike Panfil, Managing Director, Property Risk Control (US), Aon Global Risk Consulting – Bio coming soon

Dale Peck, Sales Manager, Distribution and Circulation, Chicago Sun Times News Group – When Dale joined the Chicago Sun Times, he harnessed years of relationship building with an emphasis on teamwork, quality and talented people. His mantra 'people first' affords him a unique rapport with those on his team. He also brought 'best practice' relative to building the Sun Times circulation platform and expanding existing relationships through non-traditional advertising solutions and tailored made programs for local and regional businesses. In recent years he has increased the Sun Times brand awareness and affinity by 30% and his efforts are attributed to fueling a 1.6M increase in circulation sales. To his credit, Dale was promoted to management within the first twelve weeks of his employment based upon his creative talents to develop innovative sales programs delivering solid results. Before joining the Sun Times, Dale worked in construction and property management for the John Buck Company. Dale earned two Master degrees: one in Business Administration and one in Architectural Management, along with a Bachelor of Science degree from The University of Illinois at Urbana-Champaign. He is an avid gardener, travel enthusiast and art collector. Dale, currently resides in 'Bucktown' on the west side of Chicago.

Molly Peters, J.P. Morgan, Vice President, Wealth Manager, Private Wealth Management - Molly Peters is a Wealth Manager in the Private



Corporate Advisory Board

Wealth Management group at JP Morgan and is responsible for managing relationships with affluent individuals and families. Molly joins JP Morgan with experience in the healthcare and industrial banking sectors as well as wealth management. She started her career as a bank auditor at a large accounting firm before joining the banking industry in 2001. She has expertise with both credit and non-credit products and has been a critical part of two start up banking offices in Chicago. Molly graduated with a BS, Finance, DePaul University and is NASD securities licensed with Series 7 and 63.

Kristen Parsons, Relationship Manager, Silicon Valley Bank - Kristen Parsons is a Relationship Manager covering the Midwest Region's technology and life sciences practice for Silicon Valley Bank (SVB). She is responsible for managing relationships with early stage to mid-size public companies as well as Venture Capital and Private Equity groups. Kristen has over 10 years of banking experience including client management roles covering the Midwest with Citigroup's mid-corporate banking group in Chicago and LaSalle Bank. She has extensive experience in both business development and risk management. Kristen graduated with a BS in Finance from the University of Illinois at Urbana-Champaign.

Chris Walsh, CFF Board President; Enterprise Solutions Engineer, Google, Inc. - With 15 years in the IT industry, 10 with IBM, Chris recently joined Google as a Solutions Engineer. Chris specializes in web, collaboration, and communications. He has consulted on and implemented solutions for a number of the biggest names in US and international banking, retail, utility, entertainment, and government.

Brian Winborne - Bio coming soon.

For additional information, please contact Molly Riley, Executive Director, at 312.236.4491