

Private Equity SIG | Understanding Equity Incentives: From Legal Frameworks to Tax Implications

September 24, 2025 | Dallas TX

Last Name	First Name	Title	Company Name
Alvarez	Milly		Otto Aerospace, Inc.
Armani	Lee	Partner	iMag Partners
Baumel	Corbin	Chief Financial Officer	Ziflow
Beneke	Terry		
Bennett	Tammy	Director, FP&A	Neighorly
Brown	Mark	Partner	S+H Consulting
Campbell	Craig	Director	CRE Real Estate Services
Casey	John	Managing Director	John Casey & Associates
Castillo	Miguel	VP Finance	
Cobb	Lisa	Principal	ExecHQ
Coy	Chris	VP Finance	Authentix
Czech	Mark	President	Real Business Vantage, LLC
Dubowski	Thomas	Vice President-Finance	Dallas Regional Chamber
Dunn	Paul	CPA, CMA, PMP	Paul Dunn, CPA
Ephraim	Erich	Managing Director	Mizuho Americas
Farrell	Jim	Chief Executive Officer, Chief Financial Officer	Synctive
Frankl	Richard	CFO - Advisory Services	Dial Strategies
Gonzalez	Irma	CFO	LST Companies
Guyton	Gary	Vice President, Investor Relations	Atlas Lithium Corp. (Nasdaq: ATLX)
Harris	May Lee	Principal	Force10 Consulting
Helpfenbein	Kendall	CFO	Vandelay Hospitality Group
Hutti	Bonnie	Chief Financial Officer	Bacon Plumbing Heating Air Electric
Jaynes	Greg	Chief Financial Officer	Ennis Steel Industries, Inc.
Jendrzey	Liz	Controller	Bioworld Merchandising
Kearney	Stephan	EVP, CFO	Concord Medical Group
Lee	David	Manager - Consulting	Baker Tilly US, LLP
Lidji	Barrett	Partner	Northaven Capital Partners
Mandel	Ben	Chief Financial Officer	CFS Technologies
McKiddy	Gary	Chief Financial Officer	Click n' Close, Inc.
McLaughlin	William	Chief Financial Officer	Curbside SOS, Inc.
Mesenbrink	Curt	Director of Finance	Special Products & Manufacturing
Mielke	Jens	CFO - Advisory Services	Venturity Financial Partners
Mutadich	Dan	Managing Director	Mutadich Financial Advisory
Patton	Stormy	CFO	Nobilis Group
Porter	Julie	Interim / Consultant CFO	
Powers	Kristine	Senior Director - Corporate Treasury	Aimbridge Hospitality
Rachel	Monica	Controller / Vice President	Canyon Partners Real Estate LLC
Ramsier	Daniel		
Rapert	Warren	Partner	Colvin Resources Group
Rischar	John	Managing Principal - Lease Administration	Cresa
Rushing	Ron	VP Finance	Primal Health
Schmidt	Darvin	Managing Director	Constructive Transformations
Shaver	Damian	CFO	Tradition Agency
Shaver	Mindy	Corporate Controller	Navigator Energy Services
Smaistr	Scott	Chief Financial Officer	Silicone Specialties, Inc.
Sommerhalder	John	Vice President - Finance	STATinMED, LLC
Spencer	Michael	In Transition	

Sturgeon	Monte	CFO	Conserv e2
Teich	Alan		
Trojan	Jerry	CFO	BlueAlpha Capital, LLC
Van Houten	Kent		
Wade	Trudy	CFO	Ready Computing LLC
Walbom	James	Principal	The GFO