FEI DALLAS

October 12, 2026

Healthcare: On the Edge of a Major Paradigm Shift

A conversation with

Christopher W. Kersey

Moderator: Tom Montgomery

Tom Montgomery



Tom Montgomery brings decades of financial, transactional, and strategic leadership to the Board, grounded in extensive experience advising and investing in complex business transactions. He is the Managing Member of Montgomery Capital Advisers LLC, a diversified capital management focusing on predominately debt transactions and business advisory firm. In early 2025, Tom also founded Woodfin Capital Partners with two of his sons.

Woodfin's primary focus is on investing in private equity deals as a principal. Tom's expertise includes advanced tax strategy, mergers and acquisitions, public and private debt and equity financing, and strategic and operational planning for middle-market and large enterprises.

In 2003, Tom co-founded Montgomery Coscia Greilich LLP (MCG), a full-service CPA firm that grew to more than 300 professionals. During his tenure, he advised companies on tax planning, mergers and acquisitions, and complex financing transactions. In 2018, Tom and his partners successfully sold MCG to Baker Tilly.

Prior to MCG, Tom started and scaled Beal Capital Markets, Inc., the investment banking subsidiary of Beal Bank, leading public and private corporate finance initiatives and deploying more than $2 billion across a diversified portfolio of high-yield securities and direct corporate investments. Earlier in his career, he was the founding and managing partner of Montgomery Baggett & Drews, LLP.

Tom holds a Bachelor of Business Administration and a Master's degree in Accounting and Taxation from Texas Tech University and is a Certified Public Accountant. He resides in Dallas with his wife, Beth; together they have three children and three grandchildren.

MODERATOR

Tom Montgomery

Christopher W. Kersey, M.D., M.B.A.



Panelist

Christopher W. Kersey

Christopher W. Kersey, M.D., M.B.A., serves as the Founding Managing Partner of Havencrest Capital Management LLC, one of the nation's leading private equity firms focused on the health care and life sciences industries.

Prior to founding Havencrest, Dr. Kersey served as a Managing Member and Partner of Camden Partners Holdings LLC, one of the oldest, largest and top-ranked growth equity and investment management funds in the United States, where he focused on private equity investments in the health care and life sciences industries.

In 2010, Dr. Kersey was elected to the board of trustees of Johns Hopkins Medicine, a $10 billion integrated global health enterprise and one of the leading academic health care systems in the United States, where he now serves as an Emeritus Trustee. In 2010, Dr. Kersey was also elected to the board of trustees of The Johns Hopkins Hospital, which has been consistently ranked among the best in the nation by *U.S. News & World Report* throughout the survey's 30+ year history, where he now serves as an Emeritus Trustee.

In 2011, Dr. Kersey was elected Chairman of the Board of Johns Hopkins Medicine International, the global arm of Johns Hopkins Medicine with hospital management and clinical education services in North America, South America, the Middle East, Europe and Asia.

In 2017, Dr. Kersey was elected to the board of trustees of the GuideStone Funds, the largest Christian mutual fund in the world with more than $17 billion in assets under management (AUM), where he served on the Investment Management Committee and the Nominating and Governance Committee.

A Phi Beta Kappa, Truman Scholar and Presidential Scholar graduate of Stanford University, Dr. Kersey graduated *summa cum laude* as the Class of 1996 Valedictorian at the Emory University School of Medicine, where he was awarded one of four Robert W. Woodruff Fellowships and elected to the Alpha Omega Alpha medical honor society.

In 1996, Dr. Kersey attained the distinction of becoming one of the first individuals in history to achieve the Harvard Triple Crown, as he was accepted in the same year into the residency program of Harvard Medical School as well as Harvard Law School and Harvard Business School, where he later graduated as the Class of 1998 Walter Fellow as one of the school's first medical doctors.

A teammate of Pete Sampras on the Prince High School All-American Tennis Team and former professional tennis player, Dr. Kersey and his wife, Johannah, have three children together and reside in Dallas, Texas.



Thank You

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