

2026 NTCHBA Biographies (Shortened)

- **PATRICK ALYWARD**

Patrick Alyward is the Founder and CEO of TRUSTworthy Consultants, Inc. where he partners with Bank and Trust Organizations on fiduciary compliance solutions and training needs. He is an industry expert, serves on trust company boards, and is a frequent speaker and conducts many training seminars related to the trust industry. Patrick has 30+ years within the banking/fiduciary & wealth management industry with focuses on fiduciary compliance, unique assets held in trusts, policy/procedures, and operations/tax. He was recently with RIC (Resource Insurance Consultants) serving as CEO where they specialized in assisting with unique assets residing in fiduciary accounts. Patrick has consulted and partnered with over 200 banks and trust companies (including 6 of the top 7 U.S. banks). Lastly, Patrick served in critical executive roles in banking, managing several fiduciary wealth mgt. functions. He was an Executive Vice President at PNC/National City for 15 years where he was Chief Fiduciary Officer and managed several hundred team members in 15 states. He also previously worked at EY and KPMG in fiduciary tax leadership roles.

- **JAMES BOHNAKER**

James Bohnaker is a Principal Economist within Cushman & Wakefield's Global Think Tank. James authors thought leadership, leads forecasting efforts, and provides strategic advisory to the firm's executive leadership and valued clients. James has an extensive background as a global macroeconomist and has provided forecasting and consulting advisory for many of the world's largest financial institutions and corporations while in previous roles at Moody's Analytics and S&P Global. James also previously worked at CBRE where he was a leading member of the firm's economic and real estate forecasting platform. James' expertise has been featured in leading news publications including the Wall Street Journal, CNBC, New York Times, and NPR's Marketplace. He is regularly a featured speaker at industry events such as those hosted by NMHC, ICSC and NAIOP. He has a Masters degree in Economics from Old Dominion University and a Bachelors in Mathematical Economics from Hampden-Sydney College. James is a Certified Business Economist (CBE) and member of the National Association of Business Economists (NABE).

- **DAVE COLEMAN**

With over 35 years of experience in the aviation industry, David Coleman brings a wealth of knowledge to clients of Coleman Jet Solutions. Growing up in a business aviation-oriented family, Dave has extensive experience in technical oversight and flight operations. Dave has particular expertise and interest in complex cross-border, and regulatory issues. Dave is a current ATP-rated pilot with over 7,500 Hours of flight time in over 40 aircraft models including ratings in turboprops, jets, and seaplanes. While actively engaged in his business endeavors in Chicago, Dave continues to fly. He owns a high-performance piston twin aircraft that he rebuilt and refurbished himself, and donates his time and aircraft to Lifeline Pilots, shuttling financially disadvantaged medical patients throughout the Midwest.

- **JAKE DIORIO**

Jake Diiorio, CTP, is a seasoned restructuring expert and court-appointed fiduciary and is instrumental in resolving complex turnarounds, receiverships, and loan workouts for operating businesses and real estate entities. He designs and implements strategies to repair fractured relationships between debtors, creditors, and other stakeholders to achieve the best outcomes for all parties involved. Jake applies his extensive experience as a fiduciary to manage projects ranging from solvency analyses to comprehensive receiverships and Chapter 11 restructurings. He works closely with management to assess financial and operational viability and design the optimal path to recovery, which may include recapitalizations, going-concern sales, asset dispositions, and liquidations. He provides clients with key reports throughout the process to facilitate informed decisions. Prior to joining the Stapleton Group, Jake was a senior auditor at Ernst & Young in New York, NY, where he specialized in valuation analysis for Fortune 500 companies across multiple industries.

- **KEVIN HARRIS**

Kevin started his career as a CPA with a national accounting firm and also worked with 1st and 3rd generation family offices prior to joining Northern. He has spent his career working extensively with private companies and their owners. Northern's Family Business Group manages a portfolio of private companies which Northern holds within estates and trusts where it serves as fiduciary. In addition to serving as an officer and/or director of several portfolio companies, he is also actively involved with business owners on a variety of engagements including strategic planning, governance, business restructuring, succession planning and the marketing, sale and wind-up of closely held entities.

- **DAVID HARKINS**

David Harkins is a Vice President with Mercer Capital. David has been involved with hundreds of valuations and litigation support engagements in a diverse range of industries on local, national, and international levels. He provides valuation analyses for commercial litigation, gift and estate tax planning, family law, transactions (M&A), fairness and solvency opinions, and employee stock ownership plans (ESOP), among other valuation-related service needs of privately held businesses. As the leader of the firm's Auto Dealership Industry team, David publishes research on valuation issues in the newsletter *Value Focus: Auto Dealer Industry*. He also contributes regularly to Mercer Capital's *Auto Dealer Valuation Insights Blog*. As a member of Mercer Capital's Litigation Group, he serves as both a consulting and expert witness for complex financial matters related to valuation, lost profits, shareholder disputes, damages, business litigation, commercial litigation, marital dissolution, and further matters requiring financial, valuation, and/or forensic accounting expertise. David has served as a volunteer expert at trial prep courses put on by the ABA and NFLTI and is currently an adjunct professor at Lipscomb.

- **BRUCE HENDRYX**

Bruce is a succession planning, development and closely held business expert with PNC's Asset Management Group. He has over 20 years of experience in the banking, investment and public accounting industries. In his role as Senior Vice President and Director of Closely Held Business Strategies, Bruce is responsible for helping business owners prepare for the transfer of their companies, development of real estate and manages closely held businesses currently held in estates and trusts in the Asset Management Group. In his role as a closely held business advisor, he works with companies to understand their market, their management team and prospects for financial success. In situations where PNC holds these assets, he coordinates the role as shareholder with other owners, officers and directors to best appreciate the benefits and risks to our fiduciary clients. Owners (and in estate situations, their families) appreciate the no-nonsense approach to helping them meet their needs and protect their business interests.

- **DAVID JOHNSON**

David Fowler Johnson is widely recognized as one of the go-to fiduciary litigators in Texas. David's practice focuses on trust, estate, and closely-held business disputes. A frequent writer and speaker, David is known around the state as a thought leader in the fiduciary area. His award-winning blog, *Texas Fiduciary Litigator*, features recent case law, legislative changes, and other precedent that impacts fiduciaries in Texas. David received the JD Supra 2020 Readers' Choice Award for Wealth Management, which was his third year in a row for such an award. He was also named a "Go-To Thought Leader" in Fiduciary Litigation by the *National Law Review* in 2020. David's experience in trust and estate disputes includes will contests, elder abuse, mental competency, undue influence, trust modification/reformation/clarification, breach of fiduciary duty and related claims. He also handles matters involving trust decanting, trust severance and joinder, account disputes, power of attorney disputes, suits for judicial instruction and discharges, heirship proceedings, suits to remove a fiduciary, and accountings. Additionally, David has a transactional practice for trust departments in providing legal opinions on the construction of trust documents, documenting release and consent agreements, resignations, successor appointments, modification of trusts, trust mergers, trust severances, etc. David is licensed and has practiced in the U.S. Supreme Court; the Fifth, Seventh, and Eleventh Federal Circuits; the Federal District Courts for the Northern, Eastern, and Western Districts of Texas; the Texas

Supreme Court and various Texas intermediate appellate courts. David also served as an adjunct professor at Baylor University Law School and Texas Wesleyan Law School.

- **CURTIS KIMBALL**

Mr. Kimball is founder and president of Vinewood Investment Analytics Inc. He has been valuing private company interests and restricted interests in public companies, intellectual properties, and other intangible assets, rights, claims, and investments for a variety of purposes for over 40 years. For 35 of those years he worked at Willamette Management Associates. He recently retired as a senior managing director of Willamette, a nationally prominent valuation and financial analysis firm that celebrated its 50th anniversary in 2019. Willamette is a subsidiary of Citizens Financial Group, Inc. (NYSE: CFG), a banking and financial services company. He continues to work as a consultant with Willamette's regional, national, and international clients out of the firm's Atlanta regional office, which he opened in 1995. He serves other clients directly through Vinewood.

- **DOUGLAS KNAPP**

Doug Knapp joined DM&A in 2025 and has nearly two decades of business valuation experience. Previously, he held various valuation roles in the private sector and as a lead valuation analyst at the Internal Revenue Service (IRS). During his career, Mr. Knapp has assisted and educated business owners, attorneys, and auditors regarding the valuation of closely-held business interests. Mr. Knapp's valuation analyses and reports have been prepared for purposes of estate and gift tax, charitable contributions, litigation support, and transaction advisory. He has successfully defended his opinions of value at the IRS appeals level while in the private sector and with the Service.

Mr. Knapp is an Accredited Senior Appraiser (ASA) in Business Valuation through the American Society of Appraisers, where he has been a member since 2012. He is a former treasurer and board member of the Princeton, New Jersey Chapter of the American Society of Appraisers. Mr. Knapp is also a member of the Philadelphia Estate Planning Council. Mr. Knapp holds a bachelor of science in business administration degree from Rider University, where he majored in finance.

- **JENNIFER LASH**

Jennifer Lash is the Director of Music Licensing at CMG Worldwide, Inc. in Nashville, where she has overseen music licensing operations since 2014. As the primary licensor for Dr. Maya Angelou's literary and spoken-word catalog, she brings over three decades of expertise to negotiating synch, sample, and merchandising deals for some of the most enduring names in American arts. Jennifer offers a unique, dual perspective on the industry, having managed rights clearance from both the licensor side and on behalf of licensees, ensuring a streamlined path to usage approvals. Her comprehensive background in royalty and licensing administration includes pivotal roles at Broadcast Music Inc. (BMI), the Harry Fox Agency, EMI Music North, and serving as Director of Copyright and Licensing at Next Decade Entertainment. This trajectory provides Jennifer with a rare 360-degree vantage point on royalties across publishers, licensors, and performing rights organizations. A graduate of DePauw University with a Bachelor of Music, she combines a musician's ear with a dealmaker's precision to navigate the complexities of today's creative economy.

- **RONALD NAHASS**

Ronald Nahass is a principal in RSM's Consulting practice and a strategic growth leader with 18 years of progressive professional services experience. He leads RSM's New York Consulting business and serves in firmwide leadership roles, including on the Family Enterprise Executive leadership team and as an Enterprise Account Leader. Ron advises family enterprises, fund owners, financial intermediaries on complex growth, transformation and transaction-related matters. His perspective is grounded in deep financial consulting experience across business valuation, transactions, financial forensics and dispute advisory services. As a leader in RSM's Microsoft Innovation Hub in New York, he also brings a

technology-enabled advisory lens to help clients evaluate opportunities, align stakeholders and move forward with clarity.

- **CHRIS PEIFER**

Chris Peifer is the Valuation Director for J.P. Morgan's Closely Held Asset Management group. Mr. Peifer oversees the valuation and financial analysis of nearly 800 assets in the Closely Held Asset Management group's portfolio. In addition, Mr. Peifer assists J.P. Morgan's Private Business Advisory group with the analysis and evaluation of closely held companies to facilitate consultations with private business owner clients. Mr. Peifer has over 25 years of business valuation experience. Prior to joining J.P. Morgan in 2016, Mr. Peifer worked for several valuation firms in the Chicago area, where he prepared valuations of privately held companies for estate and gift tax purposes, shareholder disputes and other litigation matters, transaction due diligence, and corporate planning. Mr. Peifer previously worked for J.P. Morgan from 2007 to 2010, where he provided valuation and consulting services as part of J.P. Morgan's Valuation Advisory Services group. Mr. Peifer is a graduate of the University of Utah (BA) and Westminster College of Salt Lake City (MBA). He holds the Chartered Financial Analyst (CFA) designation from the CFA Institute, and the Accredited Senior Appraiser (ASA) designation from the American Society of Appraisers. His professional affiliations include membership in the CFA Institute, the CFA Society of Chicago, and the American Society of Appraisers, Chicago Chapter. Chris lives in Chicago.

- **FRANK MCGREW**

Frank McGrew joined GCG in December 2025 as Managing Director and Co-Head of Industrials. He previously led the launch of JP Morgan's Nashville Regional Investment Bank, specializing in middle-market healthcare, diversified industrials, and business services. Before JPM, he was Managing Partner at McNally Capital, overseeing Merchant Banking and supporting Direct Investing with family offices. Previously, he served as a Managing Director at Raymond James, focusing on diversified industrial, manufacturing, and technology companies. Notably, he founded the firm's Global Water Infrastructure Banking Practice. His early career included significant global experience at major investment banks, including Morgan Stanley, Merrill Lynch, and Salomon Brothers, across the US, Asia, and Europe. Frank is based in Nashville with additional responsibility for growing GCG's presence throughout the South.

- **CHRIS NEKVINDA**

Chris Nekvinda serves as the Director of Global Learning at Cannon, leading consulting, instructional design, content creation, and organizational change initiatives. With over 15 years of experience, Chris has a proven track record of enhancing performance and efficiency in financial services operations, technology, wealth management, and corporate banking. Chris earned his PhD from Capella University, with his dissertation focused on models for developing performance support systems for just-in-time social learning. Chris has designed and implemented global sales and management processes for major banks, including National City and PNC. These processes have been successfully executed across more than 40 countries and in 11 languages. Additionally, he pioneered Cannon's social learning platform and cryptocurrency/digital asset curriculum. Chris is a seasoned blockchain strategist who bridges traditional and decentralized finance (DeFi). He serves on the CWS® Board of Standards and is a frequent speaker on learning innovation, blockchain/cryptocurrency, and practical wisdom for financial professionals.

- **TODD POVLIICH**

Todd is a Shareholder and Managing Director at MPI and is based in the firm's New York City office. Since joining MPI, Todd has determined the value of closely held securities of companies and partnerships in many industries for a variety of purposes, including estate and gift tax, income tax, matrimonial proceedings, employee stock ownership plans, corporate planning and restructuring, financial reporting, sale, merger, stock purchase plans and buy-sell agreements. Todd has prepared valuations of

closely held operating companies, asset holding entities, as well as other securities such as undivided interests in real estate, closely held promissory notes and preferred stock. While his experience is broad with respect to entity structure and industries, Todd specializes in the valuation of pass-through entities, alternative asset management firms and carried interest.

Education: Chartered Financial Analyst®, CFA Institute

M.B.A., Concentration in Finance: Rutgers University, 2009

B.S., Major in Finance: The College of New Jersey, 2003

- **LEE RITTER**

Lee Ritter is an Executive Director and Practice Leader for the Closely Held Asset Management (CHAM) and Real Property Asset Management (RPAM) Groups within the Trusts & Estates Team at J.P. Morgan Private Bank. In this capacity, Lee oversees a team managing over \$7 billion in closely held and real estate investments. The CHAM Group specializes in managing privately held businesses, partnerships, limited liability companies, and other closely held assets within the trusts and estates of J.P. Morgan Private Bank clients. The team is actively involved in fiduciary and business matters, including attending shareholder meetings, serving on boards of directors, acting as officers or managers, and conducting due diligence on managed investments. The RPAM Group provides comprehensive property management services for a diverse range of properties held in trust and estate accounts at J.P. Morgan. These properties include single and multi-family residential, office, industrial, mixed-use, farm and ranch, retail, and vacant land. The team of real estate professionals assists with property management tasks such as acquiring, selling, and leasing assets, ensuring proper insurance coverage, coordinating routine maintenance and capital improvements, and directing regular inspections and appraisals. They also develop strategies for risk mitigation, environmental compliance, capital planning, and the prudent oversight of legacy assets across multiple generations. With over 19 years of experience in the trusts and estates industry, Lee joined J.P. Morgan in 2004 through the Bank's Corporate Development Program and served as a Project Manager for bank mergers before joining J.P. Morgan's Specialty Asset Group in 2006. Lee holds a B.S. in Business Administration from Miami University. He is a Certified Trust and Financial Advisor through the American Bankers Association's Institute of Certified Bankers and has served as Vice President of the National Trust Closely Held Business Association.

- **JAMIE SANDERS**

Jamie's primary expertise includes income tax, estate tax and personal financial tax planning. She works extensively with high-net-worth families, trustees, business owners, executives and charitable organizations to structure and coordinate transactions around family wealth preservation, wealth transfers, charitable transfers, asset protection, and closely held enterprises' business matters, along with the tax compliance for multigenerational families and closely held businesses. She started her career with RSM in Chicago, Illinois, and moved to the Houston, Texas, office of RSM in 2012.

- **ANDREW TANNER**

Andrew P. Tanner is a Managing Director and the Private Business Executive within the Specialty Asset Management group at Bank of America. In this role, Andrew leads a team that manages equity investments in private companies held in trusts, estates and investment management accounts. Andrew ran a team focused on commercial & residential real estate from 2012-2021 and continues to work with business owners facing and working through transitions in their businesses. Prior to joining Bank of America, Andrew served as Director of Specialty Assets and Fiduciary Investments for First National of Nebraska. He also worked for Bank One Corporation as a regional director of Closely Held Asset Management and investment manager for all Employee Stock Ownership Plans (ESOPs).

- **RONALD VARNEY**

Ronald Varney has over thirty years of experience in the international art market, working first at Sotheby's for twelve years as a Senior Vice President of Trusts and Estates before beginning his own specialist art advisory firm in 2002. With offices in New York, Palm Beach and London, the firm works primarily with leading financial and legal advisors throughout the country in serving the specialized art-related needs of families and private collectors. The firm has been recognized yearly, from 2019 through

2026, by the Family Wealth Report Awards as the winner in the category “Art & Private Collections” in competition with such firms as Citi Private Bank, Hightower and Bank of America.

The firm is especially skilled in handling the valuation and sale of large and complex collections in every possible field of interest—from paintings and sculpture to furniture and decorations, musical instruments, jewelry, wine, watches, classic cars, antiques, Asian art, books and manuscripts, and all manner of collectibles. Mr. Varney has written widely on the arts for *The Harvard Business Review*, *Smithsonian*, *House & Garden*, *The New York Times*, *The Wall Street Journal* and numerous literary magazines, including *The Hudson Review* and *The Virginia Quarterly Review*. He is a cum laude graduate of Amherst College, where he majored in English.

- **CHRISTINE WAKEMAN**

Christine S. Wakeman is a member of Winstead's Wealth Preservation Practice Group. She is a fellow of the American College of Trust and Estate Counsel. She is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. She received her J.D. from Southern Methodist University Dedman School of Law in 2010, *cum laude*, and her B.A. from the University of Oklahoma in 2006, with special distinction for graduating with an undergraduate GPA of 4.0. While in law school Ms. Wakeman completed internships with Estate Tax Attorneys in the Internal Revenue Service's Small Business/Self-Employed Division and the legal department of U.S. Trust/Bank of America. While an undergraduate at the University of Oklahoma, Ms. Wakeman was a Cortez A.M. Ewing Public Service Fellow, who served in the Washington, D.C. office of United States Senator Tom Coburn. She was also a research assistant for a book being written by the Hon. Robert Henry, Judge of the United States Court of Appeals for the Tenth Circuit, during her tenure at the University of Oklahoma. Ms. Wakeman focuses her practice on traditional estate planning with an emphasis on the transfer tax planning aspects of trusts and estates and charitable planning. Her experience includes drafting a variety of estate planning documents, preparing federal estate and gift tax returns and private letter ruling requests, assisting with Internal Revenue Service examinations, and assisting clients with private foundations, probate matters, fiduciary litigation, the creation and administration of various business entities, transfer tax planning, and pre-marital and post-marital property issues. Ms. Wakeman is admitted to practice law in the State of Texas.

- **ERIC WARD**

Eric Ward, ASA, is a Principal of AltaView Advisors LLC and is located in the firm's Dallas office. He has extensive experience working with a broad range of businesses ranging in size from small private companies to multi-billion dollar enterprises. He has 15 years of experience in valuation. Eric focuses on providing valuations on behalf of private clients related to estate planning, gift and estate tax, and other corporate matters, as well as advising clients in the context of IRS audits and other controversy matters. Eric's particular practice areas include tax planning and compliance, financial reporting, corporate and succession planning, and transaction advisory. He has also performed transaction advisory services and issued fairness opinions and solvency opinions in connection with transactions and recapitalizations. Eric is well versed in the valuation of businesses at all stages of development and of a variety of security types. Prior to co-founding AltaView, Eric was a Director with Stout Risius Ross, LLC. He was the city leader for Dallas, responsible for the growth of the firm's private client services practice in the region. Prior to Stout, Eric was a Managing Director with FMV Opinions, Inc., where he was responsible for opening the firm's Dallas office and the development of the firm's valuation practice. Eric's early experience included Houlihan Lokey Howard and Zukin's financial advisory practice and the valuation and investment banking practice of Eureka Capital.

- **DENISE WYATT**

Senior Regional Closely-Held Manager for Business Advisory Services – CHB Asset Management. Responsible for managing team that is responsible for all aspects of CHB management in fiduciary accounts. Extensive experience and knowledge in the administration of trusts & estates, management of closely-held businesses in a fiduciary context, corporate governance, serving on board of directors of closely-held companies, ESOPs, working closely with attorneys, accountants and other professional

advisors with respect to trust & estate and corporate matters. Prior work experience includes Professional Associate – Business Assurance Services at PricewaterhouseCoopers LLP; Controller for LADD Transportation, a division of La-Z-Boy Incorporated; and 9 years' experience with Cercoa, Inc., her family's closely-held, chemical, manufacturing business. Adjunct professor at Wake Forest University – Financial Accounting and Financial Statement Analysis.