

# 2025 NTCHBA Biographies – Summary Only (see individual bio for full detail if available)

- **MIKE BARBER**

Mike Barber is a CPA and Partner with CohnReznick. With over 25 years of experience in public accounting, Mike Barber provides audit, review, agreed-upon procedure and other accounting services to clients as part of the Assurance practice, primarily in mortgage banking, investment funds, commercial and multifamily real estate, and healthcare industries. He is a dedicated business partner to clients, offering ongoing business and accounting advice designed to deliver highly satisfactory results.

- **BRUCE BENSCH**

Bruce is an executive compensation consultant with more than 45 years of experience in all facets of compensation arrangements, planning and tax planning relating to compensation arrangements and international human resource consulting. Bruce was formally the national managing partner of Grant Thornton's Human Capital Services Practice; he was also the partner-in-charge of Arthur Andersen's North American and Latin American Human Capital Practice and the Divisional President of a consulting practice for a publicly traded company. Bruce is a certified public accountant and a member of both national and state organizations, including the American Institute of Certified Public Accountants. Bruce holds a Bachelor's degree in Business and Economics from Hendrix College in Conway, Arkansas, and a Masters in Accountancy with an emphasis in taxation from the University of Oklahoma.

- **KERI BROWN**

Keri Brown serves as a trusted advisor to some of the nation's most prominent individuals on complex federal estate, gift and income tax litigation and controversy matters, including disputes and litigation with the Department of Justice and the Internal Revenue Service. She counsels high net worth individuals and families in a variety of courts, including in the United States Tax Court, United States District Courts, and United States Courts of Appeals. She also represents taxpayers in federal tax audits and administrative appeals and represents fiduciaries and beneficiaries of trusts and estates in state courts with respect to administration and fiduciary duty issues. In addition to her tax and fiduciary practice, Keri serves as the global partner-in-charge of Corporate Social Responsibility at Baker Botts. Keri is Chambers-ranked, a Fellow of the American College of Trust and Estate Counsel and is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. She is an American Bar Association's RPTE Section council member. She is the 2022 recipient of the Texas Bar Foundation's Terry Lee Grantham Memorial Award, recognizing her pro bono service. She was recognized as a "Woman Who Means Business" in 2021 and a "40 Under 40" in 2018 by the *Houston Business Journal* for her significant business accomplishments, as well as her commitment to community service, received a resolution in her honor from the State Bar of Texas in 2020, and was named the State Bar of Texas's Pro Bono Coordinator of the Year in 2018.

- **NANCY FURNEY**

Nancy Furney has extensive experience in all types of executive compensation and employee benefit matters. She represents a diverse group of clients, including Fortune 500 companies, privately-held companies, governmental and quasi-governmental entities and tax-exempt entities. Nancy has represented both private sector and public employers, including a major airline and a publicly-held banking group, assisting with the implementation and administration of tax-qualified retirement plans (pension plans, profit sharing plans, 401(k) plans, cash balance plans and ESOPs), as well as health and welfare plans (including self-insured medical plans, cafeteria plans and fringe benefit plans) and advising with respect to employee benefits issues in private placements, initial public offerings, spin-offs, as well as corporate restructurings and financings and mergers and acquisitions. She assists with management employment agreements and executive incentive programs. Nancy assists clients with the structuring and preparation of equity incentive arrangements (including stock purchase plans, stock option arrangements, restricted stock and restricted stock unit and phantom equity plans), deferred

compensation arrangements (including Section 409A compliance), nonqualified plans and related executive compensation programs. Nancy has been recognized professionally in *Best Lawyers in America* (2014-2026); *Best Lawyers* "Lawyer of the Year"—Employee Benefits (ERISA) 2021; *D Magazine* Best Lawyers in Dallas, 2003-2025, Best Lawyers Hall of Fame, Best Business Lawyers in Dallas, and Best Women Lawyers in Dallas; and *Texas Super Lawyers*. Nancy served in various roles on the Alcuin School Board of Trustees from 2004 to 2011, including the Executive Committee and the office of Secretary. She also served in various capacities on The Winston School Board of Trustees, including Board Chair from 2014 to 2018.

- **JOHN HALL**

John Hall has almost four decades of experience in the insurance industry, encompassing life insurance, employee benefits, affinity programs, and property/casualty programs for closely held organizations. For the past 24 years, John has been a pivotal member of RHSB, focusing on the placement of commercial insurance programs for middle-market organizations, particularly in the real estate, manufacturing, distribution, and not-for-profit sectors. His role as the internal resource for alternative-funded and captive insurance programs highlights his leadership in specialized areas. John holds the position of corporate secretary at RHSB and has been a board member since 2011. His deep commitment to developing and mentoring younger producers in the early stages of their careers underscores his dedication to nurturing the next generation of leaders within the organization. John is a graduate of The University of Texas at Austin (BBA) and Dallas Baptist University (MA). He resides in Dallas with his wife, Katherine, where they raised their three daughters. RHSB is a privately held, independent insurance broker based in Dallas, Texas, for 80 years. RHSB is the exclusive North Texas Partner of Assurex Global, the world's largest privately held insurance, risk management, and employee benefits brokerage group.

- **KEVIN HARRIS**

Kevin started his career as a CPA with a national accounting firm and also worked with 1<sup>st</sup> and 3<sup>rd</sup> 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.

- **JUSTIN HOOVER**

Justin Hoover is a shareholder in the Fort Worth office of the law firm of Winstead PC. As a member of Winstead's Corporate, Securities/M&A Practice Group, Justin's representative clients include closely-held businesses, family offices, private equity firms, real estate developers, and specialty physician groups. His corporate practice centers around M&A transactions, private placement securities offerings, and real estate joint ventures, as well as significant involvement in various transactional matters within the healthcare industry and the sports industry. A Fort Worth native, Justin attended the University of Virginia for his undergrad studies, obtaining a Bachelor of Science degree in Commerce (Finance and International Business concentrations), and then the University of Texas Law School.

- **JOHN IANNOTTI**

John Iannotti, CPA, has more than 32 years of experience as a tax executive, working in both public accounting and industry, and focusing on the state and local tax (SALT) issues that matter most to his clients. John is adept at coordinating the tax function with other non-tax functions and leveraging tax as a strategic consideration in significant events such as a merger, acquisition, expansion, or divestiture. His industry experience includes manufacturing, real estate, construction, renewable energy, technology, and government contracting companies. John's services to clients include state compliance reviews for multistate clients, nexus studies, tax credits & incentive reviews, audit defense, sales tax, restructurings, M&A tax due diligence, voluntary disclosure agreements, and tax return diagnostic reviews that identify refunds and optimal filing positions. Such services include state tax planning associated with renewable energy clients associated with available tax incentives and exemptions and structuring of tax equity partnerships and their investors. Before joining CohnReznick, John was a partner in the Southeast SALT practice of a large top 20 accounting firm. While there, he led engagement teams in the implementation of

nexus reviews (including planning and remediation), ASC 740 state tax provisions, sales tax reviews, entity rationalization, compliance, and addressing business owner state residency matters. John has worked for several Big 4 accounting firms and served as the Director of Tax for an \$800 million U.S. subsidiary of an Australian privately-owned manufacturing company. Education • Emory University: BBA, Accounting • Georgia State University: Master of Taxation Professional Affiliations • American Institute of Certified Public Accountants • Certified Public Accountant – Georgia, Texas, & Virginia

- **MICHAEL KINGREY, P.E.**

Michael received his bachelor's in Chemical Engineering from Texas A&M University and started his career with ExxonMobil, gaining technical experience in the reservoir, production, and completion engineering disciplines while working as a senior engineer on several international assets, with a focus on West Africa before joining NSAI in 2015. Since joining the firm, he has led evaluations for assets both foreign and domestic, onshore and offshore, conventional and unconventional serving clients that range from closely held businesses to publicly traded companies and national governments. He has extensive experience in deterministic reserves evaluation and cash flow modeling for reserves certifications, transaction due diligence, and fair market valuations for royalty and non-operating working interests. He is a licensed professional engineer in the State of Texas and a member of the Society of Petroleum Engineers.

- **WESTON KIRK**

Weston has performed various types of valuation and economic analyses, including business and stock valuations, debt and promissory note valuations, employee stock ownership plan ("ESOP") formation and adequate consideration analyses, fairness opinions, Internal Revenue Service audit rebuttals, litigation disputes and damages analyses, merger and acquisition valuations, undivided interests in real property valuations, and intellectual property analyses.

He has prepared these valuation and economic analyses for the following purposes: transaction pricing and structuring, taxation planning and compliance (including federal income tax, charitable income tax deduction, gift tax, estate tax, and generation-skipping transfer tax), ownership restructuring and recapitalization, buy-sell agreement planning and compliance, ESOP transaction and financing, tender offers, stock option offers, litigation consulting services, and strategic information and planning.

He has performed business valuations in the following industries, among others: accounting, agricultural commodities (including coffee, poultry, stone fruits, and tomatoes), architecture, asset management, beer and liquor distribution, biotechnology, boat manufacturing, chemicals, commercial banking, construction, consulting, convenience stores, cryptocurrency exchanges, defense contracting, department stores, e commerce, energy (including, methane gas, oil and natural gas, and solar), foam production, food retail, furniture manufacturing, gaming and entertainment, grocery stores, hedge funds, lighting equipment, literary works and publishing, lithium-ion battery manufacturing, mining and aggregates, pharmaceuticals, precious metal recycling, private equity funds, racetracks, real estate, restaurants (including fine dining and quick-service franchises), software as a service, sports field construction, steel, technology (including hardware, information technology, and software), telecommunication, temporary staffing services, timberland, travel and leisure, trucking and logistics, utilities, waste management, and wholesale distribution.

- **BRAD MARCKX**

Brad is a Certified Public Accountant and began his career approximately 28 years ago as a revenue agent with the Internal Revenue Service (IRS). His background with the IRS and master's degree in taxation (MT) provides a solid foundation in helping private and public businesses address critical tax planning and compliance issues. Brad is focused in areas that include federal and state tax planning and compliance, ASC 740, Accounting for income taxes (including documentation of uncertain positions), entity choice, and strategic plans and forecasts. Brad is your tax advocate to align the short and long-range business tax objectives. He is known for listening to individual and management teams objectives and educating clients on various tax options through a collaborative approach. These may include state nexus issues, merger and acquisition taxation, or other complex situations. Brad's broad industry experience focuses include mortgage banking, real estate, manufacturing, technology, and healthcare. In addition to servicing clients, Brad participates in the Valor Mission Project helping disabled veterans, first responders, and their family members, and is a member of the Oklahoma State University, School of

Accounting Advisory Board. Education • BBA, Accounting, Oklahoma State University • Master's, Taxation, University of Denver Graduate Tax Program Professional Affiliations • American Institute of Certified Public Accountants

- **SCOTT MARTINEZ**

Scott B. Martinez is a Director and Specialty Asset Regional Manager for the Private Business Group within the Specialty Asset Management Group in the Private Bank. Scott leads a team responsible for overseeing investments in private companies held in fiduciary accounts. The team leverages experience across multiple disciplines to provide oversight through performance monitoring, business valuation, corporate governance and financial analysis. Working with client teams and financial advisors the team can assist clients of the Private Bank and Merrill Lynch integrate these private business holdings into their overall wealth plan and ensure that they are consistent with overall investment objectives. Previously, he served in a strategic and financial planning roles with the Belo Corporation, a publicly traded national media operations company. Scott earned a Bachelor of Science from the University of Illinois at Urbana-Champaign College of Business and a Master of Business Administration from Baylor University. He holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations. He is currently President of the National Trust Closely Held Business Association.

- **ROBERT MOORE**

Robert Moore is a Managing Director in the Transaction Opinions and Valuation Advisory groups. He has extensive experience in providing valuation advisory and transaction- related services to professional advisors, corporate boards and other fiduciaries and business owners. Robert has over 25 years of financial advisory services experience and focuses on providing fairness opinion, solvency opinion and business valuation services. He has served as financial advisor or issued transaction opinions on well over \$10 billion in transactions, including mergers & acquisitions, financing transactions, going-privates and recapitalizations. Additionally, Robert serves on Stout's Transaction Opinion Committee and Business Valuation Steering Committee. Prior to joining Stout, Robert was a Senior Managing Director at Howard Frazier Barker Elliott, Inc. where he served in a similar capacity. He has an MBA, Finance from the University of Texas at Austin and a BBA from Southern Methodist Univ.

- **TODD POVLIICH**

Todd is a Partner 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 dissolution 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 spans a variety of industries, Todd specializes in the valuation of alternative investment management companies and carried interest. The valuation analyses and reports prepared by Todd have been used for presentations to management, directors and stockholders of client companies, as well as to attorneys, accountants and other fiduciaries. Todd is a member of the Board of Directors of Management Planning, Inc.

- **DAVID PIETON**

Over 40-years as a trusted advisor providing M&A advisory/investment banking, valuation, succession planning and tax compliance to closely-held businesses and high net worth individuals. Experience and areas of interest include business development, ensuring continuity of client relationships, M&A advisory/investment banking and owner/family succession/exit planning.

- **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.

- **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).

- **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 year's experience with Cercoa, Inc., her family's closely-held, chemical, manufacturing business. Adjunct professor at Wake Forest University – Financial Accounting and Financial Statement Analysis.