

## **David A. Abel**

*Managing Director*

### **Columbia Capital Management**

David A. Abel joined Columbia Capital in 2017 as Managing Director. He is also an LLC Member. Prior to joining Columbia Capital, Mr. Abel worked as an investment banker at various Wall Street and regional investment banks for nearly 20 years. He also served for four years as the Director of Debt Management of the State of Illinois.

Mr. Abel's public sector experience includes capital markets performance measures, swap and debt policy development, ratings management, and bond authority consolidation. He administered the State of Illinois's two largest bond programs, including directing a \$10 billion of taxable pension bonds offering in June 2003. In addition to the State's internal debt practice, Mr. Abel served on committee positions with the Government Finance Officers Association (GFOA) and the National Association of State Treasurers (NAST).

During his tenure at municipal underwriting firms, Mr. Abel became known for his applied software engineering for custom debt management tools needed by large and frequent issuers. Including among his specialty assignments for custom work were a mortgage revenue bond program audit and reconstruction, as well as system-wide re-investment tax and regulatory compliance. Specialized assignments aside, Mr. Abel structured several hundred bond issues, many of which offered unusual tax exemption or security problem-solving opportunities. Mr. Abel holds a B.A. in Economics with public finance emphasis from the University of Colorado at Boulder, in concert with extensive additional elective coursework in applied physics and mathematics of electrical engineering. He is registered with the SEC as a Series 50 municipal advisor representative and a Series 54 municipal advisor principal.

### **Columbia Capital Management**

Columbia Capital is a full-service financial and investment advisor. Our financial advisory work spans more than 1,250 transactions representing \$60 billion in bonds sold. We have advised on transactions ranging from less than \$1 million to nearly \$2 billion in size. Our experience spans general obligation and annual-appropriation bonds, K-12 and higher education, transportation, public transit, toll roads and turnpikes, water utilities, public power, single- and multi-family housing, economic development financings, renewable energy and a variety of unique credits, including unemployment bonds and tobacco bonds.



**Daniel J. Allen, Ph.D.**

*Senior Vice President of Advancement and External Relations*  
**DePaul University**

Dan Allen currently serves as the senior vice president for Advancement and External Relations at DePaul University. Since joining DePaul in August 2015, Allen has previously served as associate vice president for Principal Gifts and vice president for Development. In his capacity as senior vice president for Advancement and External Relations, Allen provides leadership and executive management for all fundraising, alumni relations, and advancement communications strategies. He also serves in a leadership capacity as an Administrative Officer of the university.

Prior to joining DePaul, Allen served as senior associate dean for External Relations at the University of Chicago's Harris School of Public Policy. He also served as vice president of Institutional Advancement at Lewis University in Romeoville, Illinois and at Loras College in Dubuque, Iowa. Allen has worked in educational development roles for more than 20 years, and has been a frequent presenter at various educational and healthcare development conferences and seminars.

Allen completed his PhD at Loyola University–Chicago and continues to pursue his interest in the area of postsecondary educational access for low-income students. His dissertation considered how academically talented, low-income students access highly selective postsecondary education. He has presented work on improving opportunity for academically qualified, low income students to the Association for Institutional Research and has had his research published in "Research in Higher Education." Allen also has presented research on college choice and social reproduction to the American Educational Research Association, and the National Association for College Admission Counseling. His scholarship focuses on how various forms of human, cultural, social and economic capital influence the college choice behavior of low-income students.



## **Jennifer Fredericks**

Director of Business Development – Public Finance

### **IceMiller**

Jennifer joins Ice Miller from BNY Mellon where she was a vice president of business development and led corporate trust business development efforts for the public finance, municipal not for profit sectors with additional focus on project finance and P3 deal structures. She also developed and implemented strategic sales plans to drive market share, deal volume and revenue.

Previously, she served as regional president and vice president of product program and retail operations for the Girl Scouts of Greater Chicago and Northwest Indiana. In that role, she managed over \$24 million in gross sales of product and retail merchandise. She also recruited, coached and developed a team of over 25 multi-level staff.

Additionally, Jennifer served as assistant vice president of securities for JP Morgan Chase, where she managed a team of relationship managers. Her responsibilities included overseeing and negotiating commercial paper, corporate escrow, paying agent and exchange agent agreements for new and existing clients; managing the investment and disbursement of corporate escrow investment transactions; and preparing projection, metrics and other performance reporting.

Jennifer is an adjunct professor at her alma mater, Calumet College of Saint Joseph, where she graduated with a Bachelor of Science. She earned her Master of Business Administration from Purdue University Northwest.

### **Education**

#### **Undergraduate School**

Bachelor of Science, Calumet College of Saint Joseph

#### **Graduate School**

Master of Business Administration, Purdue University



**Julie Hamos**

*Senior Expert Advisor, Office of Medicaid Innovation*  
**University of Illinois**

Julie Hamos has been at Office of Medicaid Innovation (OMI) as well as serving as a consultant in healthcare since 2015. Previously she was the Director of the Illinois Department of Healthcare and Family Services, responsible for Medicaid and child support services, a \$20.5 billion budget and a staff of 2,200. She and her team were successful in redesigning the Medicaid healthcare delivery system, implementing the Affordable Care Act, modernizing major technology systems, and bringing fiscal discipline to the Medicaid budget.

Julie was elected as the State Representative of the 18<sup>th</sup> District in 1998. She was Chair of the Mass Transit Committee, playing the key role in comprehensive legislation for funding and reform of the regional transit system. Julie has served as chief sponsor of groundbreaking legislation including the telecommunications act rewrite; a statewide energy efficiency building code; rental housing subsidies; statewide broadband deployment; and quality health care including electronic health records.

Julie received her law degree in 1975 from George Washington University in Washington D.C. and became the first staff attorney for a newly formed subcommittee of the U.S. House Ways & Means Committee. She moved to Springfield, Illinois to create a legislative advocacy organization for low-income families in Illinois. She served in the Cook County State's Attorney's Office for eight years, first as legislative and policy advisor to then-State's Attorney Rich Daley and later as Director of the Child Support Division. Julie completed the Leadership Greater Chicago program in 1987, was selected as a fellow at the Harvard Kennedy School of Government for Senior Executives in State and Local Government in 2004 and was honored to be named one of *Crain's Chicago Business* "25 Women to Watch" in 2007.

Julie was born in Budapest, Hungary, the daughter of Holocaust survivors, and escaped with her family during the 1956 Hungarian Revolution.



**Adrienne Irmer**

*Associate Vice President, External Affairs*

**Illinois Institute of Technology**

Illinois Institute of Technology (Illinois Tech) announced on August 17, 2020 that Chicago civic and community leader Adrienne Irmer joined the university as its new associate vice president for external affairs. In her new position, Irmer will oversee a wide range of government relations initiatives for the university.

A proud native of Chicago's South Side, Adrienne Irmer has been a passionate champion of social causes for over 16 years; her professional work has crossed all sectors, including electoral campaign work at all levels of government. Irmer recently served on legislative staff to Cook County, within the Cook County Bureau of Asset Management.

Irmer is also a proud graduate of Kenwood Academy High School (2000) and received her bachelor's in Biology from the Massachusetts Institute of Technology (MIT; 2004). As a National Urban Fellow (2014), Adrienne received her Masters of Public Administration (MPA) and served as Special Assistant to the City Manager for the City of Beverly Hills, CA. Although a Biologist (by undergraduate degree), Irmer has applied her highly-tuned critical thinking and analytical skills to the study of the dynamic and complex systems that are communities, in the arenas of public policy, community & economic development, advocacy/activism, and community & government affairs.

Irmer is a 2019 Fellow with the Illinois Women's Institute for Leadership (IWIL) Training Academy, 2018 Emerging Leader with the Chicago Council on Global Affairs, 2017 Political Partner with the Truman National Security Project, 2017 Fellow of the Chicago Urban League IMPACT Leadership Development Program, and served as the Chapter Co-Director for New Leaders Council, Chicago from 2017-19. Irmer was appointed by Mayor Lightfoot to Commissioner of Special Service Area #42 in May of 2020, she also serves in other civic leadership capacities including: the Advisory Committee to We Will Chicago, a comprehensive city-wide planning initiative of Mayor Lightfoot; the Executive Board of Social Change; and the Leadership Board of New Leaders Council, Chicago; and the External Affairs Lead with PRIDE South Side.



**Rebekah L. Kohmescher**  
*Chief Executive Officer*  
**Altair Advisers LLC**

A founding partner of Altair at just 25 years old, Rebekah (“Beka”) Kohmescher accepted the newly created position of Chief Executive Officer (CEO) on January 1, 2018, with responsibility for the overall management of the firm. Prior to becoming CEO, Beka spent her first eight years in a client service role, then shifted to an operational role, serving as Altair’s Chief Operating Officer (COO) since 2011. Under her leadership, the firm has redesigned entire aspects of the investment reporting processes, expanded online accessibility to account information for clients, and restructured internal workflows to best meet client needs and improve internal efficiencies.

Additionally, Beka serves as the head of compliance for the firm, assisting with creating policies and filing annual reports with the SEC. She is also the direct supervisor for managers of the consulting, investment operation, client reporting and office administration teams.

Beyond her work at Altair, Beka has been a mentor to young women pursuing finance and accounting majors and has been an industry advocate for bringing more women into the financial advisory field. In 2014 Beka was selected by Crain’s InvestmentNews as one of the top 40 advisers under age 40 in a nation-wide ranking based on individual contributions to the overall investment industry, leadership and promise for the future.

Prior to Altair’s formation, Beka was a consultant in Arthur Andersen’s Private Client Services practice.

Beka is on the Board of Directors and the Finance Committee of Community Health, a free clinic that provides high-quality health care to more than 9,000 uninsured people annually. She was the 2015 recipient of CommunityHealth’s Visionary Award, an annual honor that recognizes those that exemplify the importance of making quality health care available to Chicago’s most underserved residents. She is also on the Finance Committee and the School Board of St. Benedict’s on the north side of Chicago.

Beka graduated cum laude from Xavier University with honors in accounting. She and her husband Steve, along with their three children, reside in Chicago’s Lincoln Square neighborhood



## **Betty Latson**

*Senior Vice President – Team Leader, Corporate & Commercial Banking*

### **U.S. Bank**

Betty Latson joined U.S. Bank seven years ago as a team lead of Chicago's middle market division working with companies and associations in the industrial, service and not-for-profit sectors. Latson manages a team of commercial bankers responsible for business development, client management and credit underwriting targeting middle-market companies with revenues of \$25mm million to over \$1 billion as well as nonprofit organizations involved in social services, associations, health care and education. Latson's more than 30 years of business experience and leadership enable her to work with business leaders to customize banking solutions, and to bring resources together to meet the goals and objectives of her clients. Her efforts have contributed to U.S. Bank more than doubling in size in the Chicago area and helped set the stage for continued growth.

Latson is involved in numerous organizations, including the Board of LISC Chicago, and as a member of the Economics Club of Chicago, the Chicago Finance Exchange, the Executives' Club of Chicago, and the Association for Corporate Growth.

### Education

- Northwestern University – Kellogg School of Management
  - o 1986 MBA, Finance and Accounting
  - o
- University of Illinois Urbana-Champaign – Gies College of Business
  - o 1980 BS, Finance

### **U.S. Bank**

U.S. Bancorp, with nearly 70,000 employees and \$567 billion in assets as of September 30, 2021, is the parent company of U.S. Bank National Association. The Minneapolis-based company serves millions of customers locally, nationally and globally through a diversified mix of businesses: Consumer and Business Banking; Payment Services; Corporate & Commercial Banking; and Wealth Management and Investment Services. The company has been recognized for its approach to digital innovation, social responsibility, and customer service, including being named one of the 2021 World's Most Ethical Companies and Fortune's most admired superregional bank.



**James Maurer**

*Partner*

**CohnReznick**

James (Jim) Maurer is an assurance partner in CohnReznick's Consumer & Industrial Industry practice. Based in the Chicago area, he has extensive experience in industrial manufacturing, consumer products, wholesale distribution, and transportation and logistics. For more than three decades, Jim has worked with entrepreneurial, high growth companies in manufacturing, distribution and retail, advising both public and private companies in key areas such as strategic planning, due diligence, and process improvement. With a focus on companies with global operations, he is skilled at managing complex, multinational issues.

Prior to joining CohnReznick, Jim was the Chicago Office Consumer and Industrial Products Industry Leader and Global Leader of Consumer and Industrial Products for a major advisory, assurance, and tax firm. While there, he led multiple client engagements and was responsible for developing a global strategy for the practice that drove market share throughout his industry groups.





**Scott Metcalf**

*Partner*

**Franczek P.C.**

Scott focuses his practice on counseling and representing public bodies in the broad range of matters that fall within the fields of board governance and government operations. Scott consults with clients regarding board meeting procedures as well as compliance with the Open Meetings Act (OMA) and Freedom of Information Act (FOIA) and represents them in litigation involving these laws. Scott also counsels and negotiates on behalf of public sector clients in all manner of operational issues, including annexations and detachments, budgeting, bidding, finance, contracting, construction law, tax levies, real estate, revenue protection and property tax litigation. He regularly appears before administrative tribunals, including the Illinois Property Tax Appeal Board (PTAB), as well as state and federal courts on these issues.

Scott is a regular speaker at events and has authored or co-authored numerous articles. Most recently he co-authored the chapter entitled “Property Tax Litigation” in *Real Estate Litigation* (2021), an Illinois Institute of Continuing Legal Education publication, and the article “Capturing All Your Revenue” in the Winter 2015 issue of the IASBO Update.

Prior to joining the firm, Scott was Vice President and Research Director of the Civic Federation where managed media relations and the day-to-day operations of the organization as well as published reports on a wide range of public finance and tax matters affecting local governments and the State of Illinois.



## **Matthew Nugen**

*Director, Local Government and Community Relations*

### **Peoples Gas**

#### **Employment**

- 2012-Present: *Director, Federal Government Relations* at Integrys Energy Group Inc.
- 2009-2011: *Senior Vice President* at Ogilvy Government Relations
- 2007-2008: *Barack Hussein Obama National Political Director* at Obama for America
  - Oversaw the campaign's involvement in the Democratic National Convention in Denver
- 2005-2007: *Deputy Executive Director* at Democratic National Committee

#### **Education**

University of Missouri – Columbia: Bachelor's, business administration and management

#### **WEC Energy Group**

WEC Energy Group is one of the nation's largest electric and natural gas delivery companies, with deep operational expertise, scale and financial resources to meet the region's future energy needs. We focus on reliable service, customer satisfaction and shareholder value. Our regulated utility subsidiaries include Michigan Gas Utilities, Minnesota Energy Resources, North Shore Gas, Peoples Gas, Upper Michigan Energy Resources, We Energies and Wisconsin Public Service. Together, we provide vital services to nearly 4.4 million customers in Wisconsin, Illinois, Michigan and Minnesota. Our scale and geographic proximity allow for operating efficiency across our 70,000 miles of electric distribution lines, 44,000 miles of natural gas distribution and transmission lines, and 8,800 megawatts of reliable power plant capacity.

#### Peoples Gas (regulated utility subsidiary)

For more than 170 years, Peoples Gas has delivered safe, reliable natural gas to residents and businesses in Chicago.



**David Reifman**

*President, Chicago Business Unit*

**Clayco**

*Partner*

**CRG**

As President of the Chicago Business Unit, David oversees all enterprise activity for development, design and construction related activities in great Chicago area and surrounding region while supporting Clayco's national platform. David is also a partner in CRG, Clayco's real estate development and investment firm, and sits on its Investment Committee. David's focus includes helping source opportunities, identifying potential projects and investors, supporting key elements of the development process, and forming and implementing growth strategies.

David joined Clayco in September, 2019 after serving as Commissioner of Planning and Development for the City of Chicago and was previously a partner at DLA Piper where he practiced law for over 25 years.

**ASSOCIATIONS**

Economic Club of Chicago  
Local Initiatives Support Corporation (Chicago)  
CURE Epilepsy  
World Business Chicago  
Civic Consulting Alliance  
HIRE 360  
The Civic Federation  
Leadership Greater Chicago  
Urban Land Institute  
Lambda Alpha, Ely Chapter

**EDUCATION**

J.D., Northwestern University  
Pritzker School of Law  
M.A., University of Illinois at Urbana Champaign

**Jason Rudis**

*Director, Government Relations*

**CNA Insurance Companies**

**CNA Insurance Companies**

CNA is the seventh largest commercial insurer in the United States. CNA provides a broad range of standard and specialized property and casualty insurance products and services for businesses and professionals. Headquartered in Chicago, CNA has offices throughout the U.S., Canada and Europe. In these locations, we work with highly professional independent agents and brokers to ensure our customers receive the personal service and attention they look for in a carrier.



**Armando Saleh**

*Director of Public Policy and Government Affairs*

**PepsiCo**

Armando Saleh joined PepsiCo as Director of Public Policy and Government Affairs in 2017. Based in Chicago, Armando is responsible for local and state government and community affairs in the Midwest. He has more than 20 years of experience in developing and managing issue campaigns and stakeholder engagement programs. Prior to joining PepsiCo, Armando was an executive vice president with a leading national public affairs firm and provided strategic counsel to clients across a spectrum of industries.

Armando has held similar roles at various government agencies in Chicago and Cook County. He began his career as a journalist and is a graduate of Loyola University Chicago.



**Matthew S. Szafranski, CFA, CFP**

*Senior Portfolio Manager*

**Chesley, Taft & Associates**

Mr. Szafranski joined Chesley, Taft & Associates as a Senior Portfolio Manager in 2018. Prior to joining the firm, Mr. Szafranski spent eighteen years at Columbia Wanger Asset Management (a subsidiary of AmeripriseFinancial) where he served as Senior Portfolio Manager and managed a mid-cap mutual fund. He brings a wealth of experience in researching and valuing investment opportunities.

Mr. Szafranski is a Chartered Financial Analyst and has been a member of the CFA Society of Chicago since 2005 and he is also a Certified Financial Planner™. Mr. Szafranski serves as a Board Member and Treasurer on the Cosley Zoo Foundation Board.

University of Iowa, B.B.A. in Finance

DePaul University, M.B.A. in Finance

**Chesley, Taft & Associates, LLC**

Founded in 2001 by Faris Chesley and the late A. Richard Taft, Chesley, Taft & Associates (CT&A) is an independent employee-owned investment management firm in Chicago, dedicated to serving the individual investment needs of our clients. With over \$2 billion in assets under management, we are ideally suited to service high net worth individuals and families, retirement plans, charitable foundations, and small institutions with assets over \$1 million.

Our portfolio managers average over 35 years of experience encompassing the full range of market cycles and investment trends. We each bring our own investment experience and perspective to the investment process. Collectively we benefit from the variety of viewpoints, and individually we enjoy the flexibility to bring our unique point of view to our clients.



**Mark E. Taylor**  
*Senior Managing Director*  
**Northern Trust**

## **EXPERIENCE**

Mark joined Northern Trust in 1998 and has held several positions of increasing responsibility. Mark has held leadership positions in both the commercial lending and the wealth management business at Northern. Previously he held positions with Credit Suisse First Boston and Bank One.

## **EXPERTISE**

As Senior Managing Director, Mark leads a team of 32 experienced bankers, portfolio managers, trust advisors, and wealth advisors who serve financially successful families. He is accountable for the delivery of exceptional advice and service to our clients.

## **EDUCATION**

- B.B.A. degree in Finance from Ohio University
- M.B.A. degree in Management from Ohio University

## **CREDENTIALS**

- Certified Private Wealth Advisor, CPWA®

## **COMMUNITY INVOLVEMENT**

He is a Leading Corporate Arts Council Member for The Steppenwolf Theatre Company and is an active volunteer for The Nature Conservancy of Illinois.



## **Victoria Watkins**

*Chief of Staff to Chairman, Co-Chief Executive Officer and Chief Investment Officer*

### **Ariel Investments**

- 2019-Present: Chief of Staff to the Chairman, Co-Chief Executive Officer and Chief Investment Officer at Ariel Investments
- 2019-Present: CEO at Victorian Royalty, LLC
- 2011-2019: Various roles (Legislative Counsel, Deputy Director, Senior Advisor) at City of Chicago
- 2010-2011: Assistant Counsel to the Speaker at Illinois House of Representatives
- 2005-2009: Supply Chain Coordinator at Kraft Foods

### **Education**

- 2008: J.D. in copyrights, trademarks, business and entertainment Law at DePaul University College of Law
- 2005: Bachelors in consumer Economics and finances at University of Illinois Urbana-Champaign

### **Leadership**

2021 Leadership Greater Chicago Fellow

### **Ariel Investments**

Since our founding in 1983, much has changed in the investment world, but a clear mission has consistently defined who we are and what we do. We use the market's short-term focus to uncover mispriced companies whose true value will be realized over time. We began as a small- and mid-cap value manager, and evolved strategically to offer three approaches - all of which seek out attractive intrinsic value through relatively concentrated portfolios.