

Registrant List

Monthly Meeting | January 2024

01/09/2024, 4:00 PM - 8:00 pm

Registrant Full Name	Organization Name	Title
Mr. Terry Ackermann	The Encompass Group	Chief Financial Officer
Ms. Lisa Acosta	KPMG LLP	Partner, Audit & Risk Advisory
Mr. Nobby Ahluwalia	Robert Half – Management Resources	Client Solutions Director
Mr. Marc R. Alger	PNC Bank	Managing Director
Mr. Larry K. Anders, CLU, CHFC	Summit Alliance Companies	Chairman & CEO
Ms. Carolyn Anderson	Commerce Street Capital	Managing Director
Mr. Steven J. Armond	Vertava Healthcare	Chief Financial Officer
Mr. David L. Askenase	Merill Lynch	Financial Advisor
Mr. John Atchley	Grant Thornton	Director, Client Services
Mr. Art Babb, CPA	Art Babb CPA, PC	Managing Partner
Mr. John D. Bailey		
Mr. Jack C. Baines		CFO
Mr. Donald R. Baird, II, CPA	DBRII Consulting Services	Owner
Mr. Peter Baldwin	Your Ten Percent, LLC	CFO
Mr. Kevin Barnes	Dallas CASA	CFO
Ms. Diane Barton	Mannatech Inc.	Controller
Mr. Mike Bates	AccessFares	CFO
Mr. Corbin J. Baumel	TeamSupport LLC	CFO
Mr. Benjamin Beckelman, CPA	Lain Faulkner	Tax Director
Ms. Margaret Bedgood	TurboExecs	Consulting CFO
Mr. Thomas W. Beitel, CPA	Siemens Industry Software Inc.	VP Finance
Ms. Deborah Bell	Financial Additions, Inc.	Vice President, Business Development
Mr. James T. Berry, Jr.	Communities Foundation of Texas	SVP & Chief Financial Officer
Ms. Laura Beverly	Half Price Books, Records, Magazines, Inc.	Executive VP/CFO
Mr. Frank Bilban		CFO (Ret)
Ms. Tangelia Blain, CPA	Clampitt Paper Company	CFO
Ms. Stephanie J. Bond, CPA	Perot Development	Vice President of Accounting & Finance
Dr. Talmage Boston	Shackelford, Bowen, McKinley & Norton, LLP	Partner
Ms. Stephanie Bowman	Southwest Transplant Alliance	CFO
Mr. James K. Brata, CPA	Dawson Geophysical Company	EVP, CFO, Secretary Treasurer & Director
Mr. Matt Brost	Lockton Companies	Vice President – Health & Welfare People Solutions
Mr. David Brown, CPA	Authentix	CFO
Ms. Karyn Brown	Austin Industries, Inc.	Treasurer
Mr. Mark W. Brown	VIP	Managing Director, Client Services
Ms. Kate Burda	Kate Burda & Co.	CEO/Founder
Mr. Norman Burke	Tellabs LLC	CFO
Mr. Roger W. Burns	RWB Consulting CFO	Principal/CFO
Mr. Tracy Butler	McGriff Insurance Services, LLC	Vice President
Mr. Jerry Campbell, II		
Mr. Layne Campman	BDO USA, LLP	BDS Regional Director
Mr. Kyle Carson	RGP	Director, Business Development
Mr. Matthew Carter	BPC	Financial Operations
Mr. John Casey	John Casey & Associates	Managing Director
Mr. Christopher Cervantes	Valorous Advisors	Founder & Managing Partner
Ms. Bonnie H. Chan, CPA, CIA, CISA	H+K International	Chief Operating Officer
Ms. Jennifer Chapman	Regions Bank	Senior Vice President
Mr. Wade Chapman		
Ms. Holly Chapman-Veazey	BGSF, Inc.	EVP of Finance & Accounting
Mr. John Christiansen	Robert Half Protiviti	Vice President/Division Director
Mr. David Clay	Ruby Tuesday Operations, LLC	VP, Sr. Controller
Ms. Lisa Cobb	ExecHQ	Principal
Ms. Emily Colgan	FEI Dallas	Onsite Events Manager & AV Coordinator
Mr. Arvin Combs	BGSF	Senior Recruiter - Accounting & Finance
Mr. David A. Commons		
Ms. Susan K. Conner	Pariveda Solutions, Inc. & FGM Architects	Independent Director
Ms. Cindy Cooper, CPA	Lincoln Property Company	Senior Vice President, Accounting
Mr. Bruce Cope, CPA	Midwestern State University	Adjunct Professor

Registrant List

Ms. Tammy Cordes, CPA	RGP	CPA Finance Consultant
Mr. Chris Cox	Tatum	Director of Consulting Services
Mr. Chris Coy	Authentix	VP Finance
Mr. Mark S. Czech, CPA	Real Business Vantage, LLC	President
Mr. Jeffrey D. Davis, CPA	Reddy Ice	VP Controller
Mr. Mark V. Dendle	Valtir, LLC	Chief Financial Officer
Mr. Chris Dierks, CPA	Talus Pay	CFO
Mr. Ryan Doyle, CPA	Weathermatic	Controller
Mr. Thomas C. Dubowski, CPA	Dallas Regional Chamber	Controller
Ms. Jackie Dunn	FEI Dallas	Manager
Mr. Paul Dunn, CPA		
Ms. Sharon Ellis, MBA		
Ms. Barbara Erhart		
Mr. Ray Estep	Transmira, Inc.	CFO & COO
Ms. Kinga Evans	JPMorgan Chase	Executive Director, Strategy & Transformation
Mr. Marc Farmer	UMB Bank	SVP Commercial Banking
Mr. Jim Farrell	Synctive	Chief Financial Officer
Mr. Christopher D. Fay	Summit Alliance	Relationship Manager
Mr. Craig A. Fischer	KPMG LLP	Partner
Ms. Jodie Fisher	NWI	CFO
Mr. Michael J. Fitzpatrick		
Mr. Robert Flint, CPA		
Ms. Anna Fraustro	Global Wind Service	Financial Controller
Ms. Monica Frazer, CPA		
Ms. JoAnn Freewalt	Hempz Technologies LLC	Sr. Director Finance/Accounting
Mr. Gary Fuchs	AOICFOC	CFO Consultant / Member
Ms. Abby W. Fuqua	Venturity Financial Partners	VP of Business Development
Ms. Kalgı Ganatra	Moss Adams	Senior Manager
Mr. Viren Gandhi	ZeOmega Incorporated	Senior Vice President - Finance
Mr. Vivek Gandhi	Bioworld Merchandising Inc.	VP of Finance & Accounting
Mr. Joe Garza	Associa	SVP, Client Operations
Ms. Rebecca Gentry	Conexus SG	Sales & Marketing Administrator
Mr. Kenton Getz	OneDigital Health and Benefits	Consultant
Mr. Shawn Gilbert	KPMG LLP	Partner
Mr. Bill Glatch	Tatum	Client Service Partner
Ms. Wendy Gober, CPA	Sponte Operating Inc	VP, Accounting & Finance
Mr. Rudy Gonzalez	Ansira	CFO & COO
Mr. Loren Greaves	The Rosewood Corporation	Senior Vice President & Chief Financial Officer
Ms. Sandra F. Green, CPA	Aethon Energy	Accounting Project Manager
Mr. Fred Grote	Wagner Oil Company	Chief Financial Officer
Mr. Steven V. Gummer, CPA		
Mr. Gary Guyton		Managing Director Investor Relations
Ms. Nargas Haghighi	Regions Bank	Vice President
Mr. Doug Hall	Financial Additions, Inc.	Founder & Managing Partner
Ms. Kelly Harris	Harris & Dickey, LLC	Partner/CFO
Ms. Leigh Harris	Lockton Dunning Benefits	Vice President
Ms. May Lee Harris, CPA	Force10 Consulting	Principal
Mr. Mike Haynes	VIP	Managing Partner
Ms. Sarah K. Heidelberg		
Mr. Mark Heil	Handling Systems and Conveyors	CFO
Mr. Kendall Helfenbein, MBA, CPA	Vandelay Hospitality Group	CFO
Mr. Scott Hendon	Commerce Street Capital	Managing Director
Mr. Ronald Herbert	Kings III Emergency Communications	CFO
Ms. Kim Hernandez	Baker Brothers Rotovision, Inc.	CFO
Ms. Sharla Hibberd	Kate Burda & Co.	Director of Client Experience
Ms. Anna Hinojosa	Core Personnel Staffing Services	Controller
Mr. Kurt Hodgin	Thomas Instrument, Inc.	Chief Financial Officer
Mr. Don Hoff	SRS Real Estate Partners, LLC	Vice President, Reporting & Planning
Ms. Wendy J. Holder	CIBC Bank USA	Managing Director & Dallas Market Head
Ms. Kimberly Hollingsworth-Gorden, CPA, CGMA	Watkins Construction Company, LLC	Controller
Mr. Matthew T. Horinek	Bank of Texas	Business Development Officer
Mr. Jim Howe	KVJ Holdings	Principal
Ms. Lisa Huffman	Donnelley Financial Solutions (DFIN)	SEC Reporting

Registrant List

Mr. John Hughes	BDO USA, LLP	Director
Mr. Paul Hultgren	VRC Valuation Research Corporation	Managing Director
Mr. Nathan Jacks	Bank of Texas BOKF N.A.	Senior VP, Relationship Manager
Mr. Larry Jackson	Valorous Advisors	Retirement Plan Advisor
Mr. Jim Jahnke	Tower Hill Partners	Chief Financial Officer
Mr. Greg S. Jaynes, CPA	LMC Landscape Partners, LLC	Chief Financial Officer
Mr. James Jenkins, Jr.	Santander USA	Controller US Auto Santander
Ms. Jenny Jeter	Merrill Lynch, Pierce, Fenner & Smith Inc.	Senior VP Wealth Management Advisor
Mr. Gilbert Jones, CPA		
Mr. Matthew Jones	Directions Consulting Group	Chief Navigation Officer
Mr. Richard Kang	Improving Enterprises, Inc.	VP Finance and Accounting
Mr. Stephan Kearney	Concord Medical Group	EVP, CFO
Ms. Erika Keller	Triumph Financial, Inc.	SVP, Corporate Finance
Mr. Bryan F. Keyes	Bryan F Keyes	CFO
Mr. Robert C. Kiehnle	SeatonHill Partners	Partner
Mr. Larry D. King, CPA, CGMA		
Ms. Michele King, CPA	Union Supply Group	Corporate Controller
Mr. Neil Kirchhofer	Neil Kirchhofer	CFO
Mr. Trey Knapp, CPA	Sewell Automotive Companies	Vice President, Finance and Accounting
Mr. Mike Kollman	Andersen	Director
Mr. Kevin Krautkramer, CPA	DataSpan Holdings, Inc.	Chief Financial Officer
Mr. James E. Krohn	Federal Deposit Insurance Corporation	Regional Analyst
Mr. John Kuhlman	Gallagher Construction Services	Chief Financial Officer
Mr. Jackson Lane		
Mr. Quinn Laws	Driver Pipeline Company	CFO
Mr. Larry D. LeMaster, CPA	LandDesign	COO
Mr. Barrett Lidji	Northaven Capital Partners	Partner
Ms. Kathryn R. Loo		
Mr. Robert M. Looney	Frost Bank	Senior VP Corporate Banking
Mr. John M. Lund	Behavioral Innovations	CFO
Mr. John C. Macaulay		
Mr. Mark Malay	Sunflower Bank	SVP Commercial Business Development Officer
Mr. Philip L. Mangone	Hearing Lab Technology, LLC	Vice President FP&A / Treasury
Ms. Katie Marshall	PNC	SVP, Business Development
Mr. Kevin Marshall	Mutual Performance	CEO
Ms. Maria Martindale	RGP	Vice President, Central South
Ms. Lolette May	Old Republic National Commercial Title Insurance Company	VP of Business Development
Ms. Kathryn McBride		
Mr. Andrew McCauley	Baker Tilly US, LLP	Partner, Risk Advisory
Mr. Larry McCoy, CPA	Klyde Warren Park	EVP of Finance & Administration
Ms. Kelly L. McDonald		VP Controller Consultant
Ms. Patti McKee, CPA		
Mr. Roland J. Melton		
Mr. Billy Bob Messer	BR Messer, PLLC	Founder
Mr. Jens R. Mielke	Venturity Financial Partners	CFO - Advisory Services
Mr. Brandt Miller	BDO USA, LLP	Director
Mr. Bryson Miller	VRC Valuation Research Corporation	Texas Practice Leader
Mr. Ronald Mitori		
Mr. Miguel Molina, MBA	Avocados From Mexico	CFO
Ms. Lauren Monaco	Aston Carter	Practice Lead, Accounting & Finance Consulting
Mr. Thomas Montgomery	Montgomery Capital Advisers, LLC	President/CFO
Mr. Steven Moore, CPA	Whitley Penn LLP	Audit Partner
Ms. Quyen Moreland	Digital Realty	Sr. Manager, Financial Planning & Analysis
Mr. Richard Moreland	Conexus SG	Managing Consultant
Mr. Todd Muckelroy	Associa	SVP, Finance & Accounting
Ms. Ann Murray	American Heart Association	Vice President Financial Planning & Analysis
Ms. Carolyn Murray, CPA	Moss Adams LLP	Business Development Executive
Mr. Chris Murray	Leon Capital Group	Vice President, Accounting & Finance
Mr. Greg Mykytyn	Commerce Street Capital	Senior VP
Mr. Douglas C. Nash, CPA	The Retail Connection, L.P.	CFO
Mr. Paul Neckels	Duro Hospitality	Director of Finance
Mr. Luke Nelson	RHSB	Principal

Registrant List

Mr. Michael Nesta	KPMG LLP	Partner, Accounting Advisory
Ms. Debi Nimrichter	FEI Dallas	Event Support
Mr. Jeff Null	Tekin & Associates	Chief Accounting Officer
Ms. Aleesha Ogden	L&B Realty Advisors	Divisional Controller
Ms. Meg OMalley	OMalley Consulting	Principal
Mr. Alan Oppenheimer, CPA, MBA		
Mr. Jess Padek	VIP	Partner
Ms. Kate Padilla	CIBC	Managing Director National Commercial Banking
Mr. Dinesh Parbhoo	ILE Homes	CFO
Mr. Steven Partridge	WindMass Capital LLC	CFO
Ms. Dimple Patel	Vandelay Hospitality LLC	Director of Finance
Mr. RD Patel	New Leaf Service Contracts, Inc.	CFO
Mr. Kyle Patterson	Aston Carter	Account Manager
Mr. Stephen R. Patterson, CPA	Clarity FAS	Owner / CFO
Mr. Tom Patterson, CPA	SeatonHill Partners	Partner
Mr. James C. Paulus, CPA, CFE	DASEKE	Head of Internal Audit
Mr. Sebastian Peluffo	Tango Analytics	Chief Financial Officer
Ms. Andra Phillips	Chase	Executive Director, Commercial Bank
Mr. Marc Pinney	Holmes Murphy	Vice President, Employee Benefits
Mr. Jorge Pliego	Improving Enterprises, Inc.	CFO
Ms. Elizabeth Pospick, CPA	Riveron	Senior Director
Ms. Kristine Powers	Aimbridge Hospitality	Senior Director - Corporate Treasury
Mr. Roy Price	Sealco	Controller
Ms. Claire Pugh	Baker Tilly US, LLP	Partner
Ms. Kristin Ramirez	MarshMcLennan Agency	Advisor, Dallas Employee Health & Benefits
Mrs. Mary Ramsey	Vistra	Senior Director of Retail Accounting
Mr. Warren L. Rapert	Colvin Resources Group	Partner
Mr. David Rapier	Atlantic Aviation	VP Accounting
Ms. Catherine Reams	Catherine R Reams, CPA, PLLC	CPA
Mr. Wesley Richards		
Mr. Shawn M. Riely	Westmount Realty Capital, LLC	Director, Private Capital
Mr. John Rischard, CPA	Cresa	Managing Principal - Lease Administration
Mr. Jeff Robertson	SunTree Snack Foods	CFO
Mr. Scott Robinson	BGSF	SVP Finance & Accounting
Mr. Wes Rogers	Arcosa Marine Products	VP Finance
Mr. Robert Rough	Telos Capital Advisors, LLC	Managing Director
Mr. Jim Rowell	Maxi-Lift / Southwest Agri-plastics	CFO
Mr. Michael Rubin	Commerce Street Capital	Business Development and Sales Representative
Mr. Roy Rumbough, CPA		
Ms. Helen Rushing	Noble Royalties, Inc.	Assistant Controller
Mr. Ron L. Rushing, Jr., CPA, CTP	RREAF Residential	CFO
Mr. Greg Sakowski	H&D Distributors, Inc.	Director of Finance & Accounting
Mr. Sebastian Sanchez	RHSB	Vice President - Employee Benefits
Mr. Wil Saqueton	Atlantic Housing Foundation, Inc.	CFO
Mr. Alex Sarntee	JP Morgan Chase	VP Corporate Finance
Mr. Carl R. Saxon, CPA	Eastport Holdings, LLC	CFO
Mr. Paul Schenian	SeatonHill	Partner
Mr. Craig Settle	Gaedeke Energy, LLC	VP - Accounting and Finance
Ms. Hiral Shah	Grant Thornton LLP	Managing Director
Mr. Mahesh Shetty, CPA, MBA, CGMA	ILE Homes	Founder & CEO
Mr. David R. Siebert	Sport Clips, Inc.	Former CFO, retired
Ms. Tressa Silvey, CPA	The C Group, PLLC	Managing Member/CFO
Mr. S. Scott Smaistrila, MBA, CPA, CMA	Overhead Door Corporation	Manager, Financial Planning & Analysis
Ms. Christina Smith	Co-op Solutions	Chief Accounting Officer
Ms. Ellen Smith	Riveron	Office Managing Director
Mr. Jay Smith	Jefferson Wells	Southwest Regional Director-Finance and Accounting/Data Analytics
Mr. John Sommerhalder	Granite Canyon Ventures LLC	Senior Financial Advisor
Dr. David Springate	The University of Texas at Dallas	Emeritus
Mr. Joshua Stan	Flooring Services	CFO
Mr. Paul L. Stein		
Ms. Alexandra Sullivan	MarshMcLennan Agency	Advisor, Business Insurance
Ms. Marva Tarver	Hunt Consolidated, Inc.	Chief Accounting Officer

Registrant List

Mr. Alan W. Teich		
Mr. Colin Thackray	Pacific Northern Inc.	CFO
Mr. Brett Thames	Riveron	Managing Director
Mr. Steve E. Thomas	Aligned Financial Services	Principal
Ms. Sufiana Tian	Texina	CEO
Mr. Jose R. Torres		
Mr. Jerry Trojan	BlueAlpha Capital, LLC	CFO
Mr. Javier Vallejo		
Mr. Brenton Van Breda	Primal Health	Chief Financial Officer
Mr. Adriaan L. van Eeden	LSGgroup	Chief Accounting Officer
Mr. Kent J. Van Houten		
Mr. James Walbom	SUSE, Inc.	Vice President, Finance
Mr. James B. Walburg	Ironwood Advisors, LLC	President
Mr. Brantley R. Walch	Decon7 Systems	Chief Financial Officer
Ms. Alison M. Walker	Harris & Dickey, LLC	Consultant
Ms. Esther Walzer-Brewer	Siemens-Logistics LLC	Corporate Controller
Mr. Thomas Washington	B2B CFO	Partner
Mr. John S. Wechsler	Triumph Bancorp	SVP Finance
Mr. Dory Wiley	Commerce Street Holdings	President & CEO
Mr. John A. Willding, II	Fox Rothschild LLP	Corporate and Securities Partner
Mr. Paul W. Willey, Sr., CPA		
Mr. Zachary A. Williams	Positronic Ai LIT AI	Enterprise Sales Executive
Mr. David B. Willis, CPA		
Ms. Sandra Wilson	Prescott Group	Senior Director, Accounting
Mrs. Tricia Wilson	Holmes Murphy	Client Executive
Ms. Brook Wootton	Albemarle Corporation	Senior Director, Investor Relations
Mr. Randolph H. Wright	Randy H Wright Consulting	President
Mr. Randy Wright	MRW Advisors	President
Mr. Luke Wyse, CFM	Triumph Bancorp	SVP, Finance & Investor Relations
Mr. Ronald K. Zielke	Impact Electronic Solutions, Inc.	CFO

Registrants Per Event: 274