

# Registrant List

**Monthly Meeting | April 2024 | DALLAS**

04/09/2024, 3:30 PM - 8:00 PM

| Registrant Full Name             | Organization Name                          | Title   |
|----------------------------------|--|---|
| Mr. Terry Ackermann              | The Encompass Group                        | Chief Financial Officer                       |
| Mr. Topper Afadama               | RGP  | Director, Client Development                  |
| Mr. Marc R. Alger                | PNC Bank                                   | Managing Director                             |
| Ms. Kara Altenbaumer-Price, Esq. | McGriff                                    | SVP, Executive Risk Advisors                  |
| Mr. Rich Anderl, FPAC            | One Technologies LP                        | Director of Financial Planning and Analysis   |
| 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. Corbin J. Baumel             | Ziflow                                     | Chief Financial Officer                       |
| Mr. Benjamin Beckelman, CPA      | Lain Faulkner                              | Tax Director                                  |
| Mr. Thomas W. Beitel, CPA, MBA   | Siemens Industry Software Inc.             | VP Finance                                    |
| Ms. Sarah Belcerak               | BGSF                                       | Client Services Manager                       |
| Mr. James T. Berry, Jr.          | Communities Foundation of Texas            | SVP & Chief Financial Officer                 |
| Ms. Beverly Betik-Lincks         | Crow Holdings                              | Director - Finance and Treasury               |
| Ms. Laura Beverly                | Half Price Books, Records, Magazines, Inc. | Executive VP/CFO                              |
| Ms. Serena Bhavan                | The University of Texas at Dallas          | Student                                       |
| Mr. Frank Bilban                 |  | CFO (Ret)                                     |
| Ms. Stephanie J. Bond, CPA       | Perot Development                          | Vice President of Accounting & Finance        |
| Mr. Aaron Borden                 | Grant Thornton LLP                         | Tax Partner                                   |
| Ms. Stephanie Bowman             | Southwest Transplant Alliance              | CFO   |
| Mr. Mark W. Brown                | VIP  | Managing Director, Client Services            |
| Mr. Roger W. Burns               | RWB Consulting CFO                         | Principal/CFO                                 |
| Ms. Melissa Bustillos            | Primal Health                              | Chief Human Resource Officer                  |
| Mr. Tracy Butler                 | McGriff Insurance Services, LLC            | Vice President                                |
| Mr. Layne Campman                | BDO USA, LLP                               | BDS Regional Director                         |
| Mr. Charles Carrier              | Citibank                                   | Director of Finance Consumer Tech & Ops       |
| Mr. John Casey                   | John Casey & Associates                    | Managing Director                             |
| Ms. Jennifer Chapman             | Regions Bank                               | Senior Vice President                         |
| Mr. Wade Chapman                 |  |   |
| Ms. Holly Chapman-Veazey         | BGSF, Inc.                                 | EVP of Finance & Accounting                   |
| Mr. Doug Chatterton              | Brierley & Partners                        | CFO   |
| Ms. Ginny Chrisman               | CBRE                                       |   |
| Mr. John Christiansen            | Robert Half                                | Practice Director/Sr. Vice President          |
| Ms. Nicole Clark                 | The Vested Group                           | Controller                                    |
| Ms. Emily Colgan                 | FEI Dallas                                 | Onsite Events Manager & AV Coordinator        |
| Mr. David A. Commons             |  |   |
| Ms. Chris Ann Compton            | Financial Additions, Inc.                  | Senior Director - Executive Search            |
| Ms. Susan K. Conner              | Pariveda Solutions, Inc. & FGM Architects  | Independent Director                          |
| Mr. Erik Cooper                  | Tremissis Growth Capital                   | Founder                                       |
| Mr. Bruce Cope, CPA              | Midwestern State University                | Adjunct Professor                             |
| Mr. Chris Cox                    | Tatum                                      | Director of Consulting Services               |
| Mr. Chris Coy                    | Authentix                                  | VP Finance                                    |
| Mrs. Sonyaa Curtis-Adeyoju       | Digital Realty                             | Senior Manager, Financial Planning & Analysis |
| Mr. Khoa Dang                    | The University of Texas at Dallas          | Student                                       |
| Mr. Mark V. Dendle               | Valtir, LLC                                | Chief Financial Officer                       |
| Ms. Heli Desai                   | The University of Texas at Dallas          | FEI Connie Konstans Scholarship Recipient     |
| Ms. Sakshi Dhavalikar            | The University of Texas at Dallas          | Student                                       |
| Mr. Chris Dierks, CPA            | Talus Pay                                  | CFO   |
| Mr. Ryan Doyle, CPA              | House of Outdoors                          | VP of Finance and Accounting                  |
| Ms. Elena Dronova                |  | Credit Professional                           |
| Mr. Thomas C. Dubowski, CPA      | Dallas Regional Chamber                    | Controller                                    |
| Ms. Jackie Dunn                  | FEI Dallas                                 | Manager                                       |
| Mr. Jack Edmonds                 | Regions Bank                               | Senior VP, Commercial Banking                 |
| Mrs. Alice Elkins                |  |   |
| Mr. Chip Embrey                  | Sunoco, LP                                 | Assistant Controller                          |
| Ms. Barbara Erhart               | Fritz Duda Company                         | CFO   |

# Registrant List

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| Mr. Ray Estep                         | Transmira, Inc.                         | CFO & COO  |
| Mr. Jim Farrell                       | Synctive                                | Chief Financial Officer  |
| Mr. Robert Flint, CPA                 |   |  |
| Mr. Ricardo Flores                    | RGP                                     | Director, Client Development   |
| Ms. Erin Flugstad                     | Connor Group                            | Partner • Strategic Markets - Tech Acctg                                       |
| Mr. Gary Fuchs                        | AOICFOC                                 | CFO Consultant / Member  |
| Mr. Nimish Gandhi                     | Rowley Company                          | Chief Financial Officer  |
| Mr. Viren Gandhi                      | ZeOmega Incorporated                    | Senior Vice President - Finance  |
| Ms. Rebecca Gentry                    | Conexus SG                              | Sales & Marketing Administrator  |
| Mr. Rudy Gonzalez                     | Ansira                                  | CFO  |
| Mr. Jared Grabow                      | Sunflower Bank                          | SVP & Team Lead-Asset Based Lending  |
| Mr. Loren Greaves                     | The Rosewood Corporation                | Senior Vice President & Chief Financial Officer                                |
| Ms. Sandra F. Green, CPA              | Aethon Energy                           | Accounting Project Manager   |
| Mr. Steven V. Gummer, CPA             |   |  |
| Mr. Gary Guyton                       |   | Managing Director Investor Relations   |
| Mr. Moe Haidar                        | Dialexa                                 | CFO  |
| Mr. Doug Hall                         | Financial Additions, Inc.               | Founder & Managing Partner   |
| Mr. Jim Hampton                       | Wesley Prep                             | Chief Financial Officer  |
| Ms. Kelly Harris                      | Harris & Dickey, LLC                    | Partner/CFO  |
| Ms. Megan Harrison, EMBA              | Jindal School of Management   UT Dallas | Director of Corporate Relations  |
| Ms. Sarah K. Heidelberg               |   |  |
| Mr. Mark Heil                         | Handling Systems and Conveyors          | CFO  |
| Mr. Kendall Helfenbein, MBA, CPA      | Vandelay Hospitality Group              | CFO  |
| Mr. Chad C. Henderson                 | Aston Carter                            | Practice Lead III  |
| Mr. Mark D. Henington                 | MBHenington and Company, LLC            | President  |
| Ms. Lista B. Hightower                |   |  |
| Ms. Anna Hinojosa                     | Clearly Ledger Solutions                | Principal  |
| Mr. Eric B. Holleman                  | Conexus SG                              | Managing Director  |
| Mr. Matthew T. Horinek                | Bank of Texas                           | Business Development Officer   |
| Mr. Jason Jack                        | Vizient, Inc.                           | Senior Director, FP&A  |
| Mr. Nathan Jacks                      | Bank of Texas BOKF N.A.                 | Senior VP, Relationship Manager  |
| Mr. Greg S. Jaynes, CPA               | Ennis Steel Industries, Inc.            | Chief Financial Officer  |
| Ms. Kelley Johnson                    | KEIRUS BY KJE                           | Founder & CEO  |
| Mr. Doug Jones                        | RHSB                                    | SVP & Principal  |
| Mr. Matthew Jones                     | Directions Consulting Group             | Chief Navigation Officer   |
| Mr. Richard Kang                      | Improving Enterprises, Inc.             | VP Finance and Accounting  |
| Ms. Riana-Lynn Kansakar               | The University of Texas at Dallas       | Student  |
| Mr. Gokula Ramanan Karthikeyan        | The University of Texas at Dallas       | Graduate Student   |
| Mr. Stephan Kearney                   | Concord Medical Group                   | EVP, CFO   |
| Ms. Kathy Keller                      | Likewise                                | Director Corporate Accounting and Global Technical Accounting & Consolidations |
| Mr. Bryan F. Keyes                    | Bryan F Keyes                           | CFO  |
| Mr. Robert C. Kiehnle                 | SeatonHill Partners                     | Partner  |
| Mr. Larry King, CPA, CGMA             |   |  |
| Ms. Michele King, CPA                 | Union Supply Group                      | Corporate Controller   |
| Ms. Amber Kinney                      | Mothers Against Drunk Driving (MADD)    | Chief Financial Officer and Administrator                                      |
| Mr. Neil Kirchhofer                   | Neil Kirchhofer                         | CFO  |
| Mr. Cameron Kirke                     | Marsh McLennan Agency                   | Business Insurance Advisor - Southwest   |
| Mrs. Melissa Kirkham                  | ARGO Data Resource Corporation          | VP and CFO   |
| Mr. Vlad Klenikov                     | SmartStart Inc.                         | Chief Financial Officer  |
| 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 A Cummins Group Co.           | Chief Financial Officer  |
| Mr. Richard Lauro                     |   |  |
| Mr. Quinn Laws                        | Driver Pipeline Company                 | CFO  |
| Mr. David Lee                         | Baker Tilly US, LLP                     | Manager - Consulting   |
| Mr. William W. Lesikar                |   |  |
| Mr. Todd Leveridge                    | Lockton Dunning Benefits                | Executive Vice President   |
| Mr. Ray V. Lindsay, III, CPA/CFF, CFE | Saylite Holdings, LLC                   | CAO/Controller   |
| Mr. Cory Liu                          | Butler Snow LLP                         | Attorney   |
| Ms. Kathryn R. Loo                    |   |  |

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| Mr. Robert M. Looney              | Frost Bank                        | Senior VP   Corporate Banking                             |
| Mr. Philip L. Mangone             | Hearing Lab Technology, LLC       | Vice President FP&A / Treasury                            |
| Ms. Wendy Marquart                | Tatum                             | Vice President  |
| Mr. Paul A. Mason                 | Wacker Chemicals (USA), Inc.      | CFO   |
| Ms. Jeanette Mayorga              | UPS                               | Director  |
| Mr. Bret McCuistion               | Robert Half                       | Market Director/Vice President                            |
| Ms. Patti McKee, CPA              |                                   |   |
| Ms. Mindy Kay McRae Broadbent     | VIP                               | Business Development Manager                              |
| Mr. Brandt Miller                 | BDO USA, LLP                      | Director  |
| Mr. Ronald Mitori                 |                                   |   |
| Ms. Ashley Mohan                  | BGSF                              | Managing Director, Strategic Sales                        |
| Mr. Miguel Molina, MBA            | Avocados From Mexico              | CFO   |
| Ms. Quyen Moreland                | Digital Realty                    | Sr. Manager, Financial Planning & Analysis                |
| Mr. Richard Moreland              | Conexus SG                        | Managing Consultant                                       |
| Ms. Katherine Motlagh, CPA        | EVgo                              | Audit Committee Chair                                     |
| 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. Douglas C. Nash, CPA          | The Retail Connection, L.P.       | CFO   |
| Ms. Astrid Nava                   | The University of Texas at Dallas | Student   |
| Ms. Debi Nimrichter               | FEI Dallas                        | Event Support   |
| Mrs. Jennifer Norris              | Saville CPAs & Advisors LLC       | CFO, Client Accounting Services                           |
| 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. Harish Patel                  | SGP Management LLC                | President & CFO   |
| Mr. Kyle Patterson                | Aston Carter                      | Account Manager   |
| Mr. Stephen R. Patterson, CPA     | Baylor Oral Health Foundation     | Controller  |
| 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. N. Nicole Phelan              |                                   |   |
| Ms. Alana Platt                   | The University of Texas at Dallas | FEI Connie Konstans Scholarship Recipient                 |
| Ms. Elizabeth Pospick, CPA        | Riveron                           | Senior Director   |
| Ms. Kristine Powers               | Aimbridge Hospitality             | Senior Director - Corporate Treasury                      |
| Rick Prewitt                      |                                   | Senior Vice President                                     |
| Mrs. Wendy Pritchett              | WP3 Consulting                    | Accounting and Financial Consultant                       |
| Mr. Manjul Raj                    | The University of Texas at Dallas | Student   |
| Mrs. Mary Ramsey                  | Vistra                            | Senior Director of Retail Accounting                      |
| Mr. Warren L. Rapert              | Colvin Resources Group            | Partner   |
| Ms. Hadeeqa Raza                  | The University of Texas at Dallas | FEI Connie Konstans Scholarship Recipient                 |
| Mr. Dusty Reynolds                | Andersen                          | Managing Director   |
| Mr. Wesley Richards               |                                   |   |
| Mr. John Rischard, CPA            | Cresa                             | Managing Principal - Lease Administration                 |
| Mr. Jeff Robertson                | myNILpay                          | Advisory Board Member                                     |
| Mr. Moroni Bento Rodrigues        | MarshMcLennan Agency              | Chief Financial Officer - SW                              |
| Mr. Dean H. Rosencrans            | Texas Capital Bank                | Executive Director   Middle Market Banking Group          |
| Mr. Roy Rumbough, CPA             |                                   |   |
| Mr. Ron L. Rushing, Jr., CPA, CTP | RREAF Residential                 | CFO   |
| Ms. Janice Russell                | Sabre Holdings, Inc.              | VP Financial Planning and Analysis                        |
| Mr. Sunil Sajnani                 | EZCORP, Inc.                      | Chief Audit, Asset Protection & Loss Prevention Executive |
| 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. Jim Schuchard                 | Tatum                             | Managing Partner  |
| Mr. Craig Settle                  | Gaedeke Energy, LLC               | VP - Accounting and Finance                               |

04/15/2024

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# Registrant List

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| Mr. David R. Siebert                   |                                   |  |
| Ms. Jessica Simon, CPA, CFE            | R1 RCM Inc                        | Director of Accounting and Client Services |
| Mr. Jose Simon                         | The University of Texas at Dallas | Student                                    |
| Mr. Mark Sinclair                      |                                   |  |
| Mr. S. Scott Smaistrila, MBA, CPA, CMA | Overhead Door Corporation         | Manager, Financial Planning & Analysis     |
| Ms. Christina Smith                    | PSCU/Co-op Solutions              | Chief Accounting Officer                   |
| Dr. David Springate                    | The University of Texas at Dallas | Emeritus                                   |
| Mr. Joshua Stan                        | Flooring Services                 | CFO  |
| Mr. Paul L. Stein                      |                                   |  |
| Ms. Stacey D. Stewart                  | Mothers Against Drunk Driving     | CEO  |
| Mr. Scott Stover                       |                                   | Controller                                 |
| Ms. Alexandra Sullivan                 | MarshMcLennan Agency              | Advisor, Business Insurance                |
| Mr. Rob Sutton                         | Wondr Health                      | EVP & CFO                                  |
| Mr. Patrick Tam                        | Bright Balance Accounting         | CEO & Managing Director                    |
| Mr. Alan W. Teich                      | Addison Group                     |  |
| Mr. Brett Thames                       | Riveron                           | Managing Director                          |
| Mr. Christopher Thomas                 | Blue Oak Consulting LLC           | Fractional CFO / Consultant                |
| Mr. Jim Thomas                         | 7-Eleven, Inc.                    | Asst. Treasurer                            |
| Mr. Steve E. Thomas                    | Aligned Financial Services        | Principal                                  |
| Mr. Michael Topa                       | The Keystone Group                | Executive Advisor                          |
| Mr. Jose R. Torres                     |                                   |  |
| Mr. Nick Townsend                      | Ecobat                            | VP, Financial Planning & Analysis          |
| Mr. Jerry Trojan                       | BlueAlpha Capital, LLC            | CFO  |
| Mr. John Tschirhart                    | Upbound Group, Inc.               | Senior Vice President - Controller         |
| Mr. Doug Valek                         | Primal Health                     | Controller                                 |
| Mr. Brenton Van Breda                  | Primal Health                     | Chief Financial Officer                    |
| Mr. Adriaan L. van Eeden               | LSGgroup                          | Chief Accounting Officer                   |
| Mr. Jesus Vega                         | Whitley Penn LLP                  | Cybersecurity Managing Director            |
| Mr. John Vincent                       | 4Web Medical                      | Corporate Controller                       |
| 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                                 |
| Mr. Robert Walker                      |                                   | FEI Dallas Career Management Chair         |
| Mr. Thomas Washington                  | TRW Strategic Advisors            | Strategic Advisor                          |
| Mr. John S. Wechsler                   | Triumph Bancorp                   | SVP Finance                                |
| Mr. Paul W. Willey, Sr., CPA           |                                   |  |
| Mr. David B. Willis, CPA               |                                   |  |
| Ms. Sandra Wilson                      | Prescott Group                    | Senior Director, Accounting                |
| Mr. Joe Womac                          | Texas Fireplace Express           | CEO  |
| Mr. Scott A. Woodward, CPA             | Woodward & Co., LLC               | Managing Member                            |
| Mr. John Wrentmore                     | Connor Group                      | Director • Tech Acctg                      |
| Mr. Dennis J. Wright                   | Bank of Texas                     | Executive Director - Dallas                |
| Mr. Randolph H. Wright                 | Randy H Wright Consulting         | President                                  |
| Mr. Ronald K. Zielke                   | Impact Electronic Solutions, Inc. | CFO  |

**Registrants Per Event: 224**