



PRESENTER BIOGRAPHIES



Josh Mandel
State Treasurer of Ohio

Josh Mandel was sworn in as the 48th Treasurer of the State of Ohio on January 10, 2011. Josh Mandel is a Marine Corps veteran who served two tours in Iraq and served as State Representative from the 17th Ohio House District. He was first elected State Representative in 2006, knocking on 19,679 doors and wearing out three pairs of shoes. In 2008 he was re-elected to a second term, representing a district with a 2:1 Democrat to Republican voter ratio. With broad bipartisan support, Josh was elected as Ohio's Treasurer of State on November 2, 2010. Winning 80 of Ohio's 88 counties, he was the top vote-getter of all statewide executive candidates.

Treasurer Mandel previously served as the Ranking Member of the Financial Institutions, Real Estate and Securities Committee, and dealt with issues concerning banks, investment firms, pension funds and other financial matters. Previously, as a member of the House Insurance Committee, he participated in the reconstruction of investment oversight for the multi-billion dollar Bureau of Workers' Compensation investment fund. Additionally, Treasurer Mandel has focused on energy security issues, having served as Vice-Chairman of the Public Utilities Committee and a member of the Alternative Energy Committee.

During his four years in the General Assembly, Treasurer Mandel devoted a great deal of energy towards the issues of fiscal discipline, improving the state's business climate and reversing the exodus of young people from Ohio. Due to his leadership on these and other issues, Treasurer Mandel was named legislative "Rookie of the Year" by the non-partisan Columbus Monthly Magazine and "Watchdog of the Treasury" by the United Conservatives of Ohio.

Treasurer Mandel's previous elected experience includes service as a Lyndhurst City Councilman, where he was elected in 2003 with more votes than any candidate for Council or Mayor. As Councilman, Treasurer Mandel served on the Finance Committee, dealing with issues including long-term fiscal forecasting, municipal investment strategy and bond-rating protections. Additionally, Treasurer Mandel introduced and led the fight for the first municipal property tax rollback in Lyndhurst history, which currently remains one of the only municipal property tax rollbacks in Ohio history.

Inspired by a strong sense of duty to country, Treasurer Mandel enlisted in the U.S. Marine Corps Reserves in 2000, where he graduated first in his class from Marine Corps Boot Camp and first in his class from Marine Corps Intelligence School. His Marine Corps career spanned eight years, including two tours in Anbar Province, Iraq as an Intelligence Specialist. During both tours he was awarded the Navy & Marine Corps Achievement Medal for "superior performance of his duties."

Treasurer Mandel holds a Bachelor's Degree from the Ohio State University, a Law Degree from Case Western Reserve University, and completed the Investment Decisions & Behavioral Finance program at Harvard University. Treasurer Mandel is committed to protecting and responsibly investing Ohioans' hard-

earned tax dollars and working on creative ways to fuel small business growth in Ohio. Through the use of technology, Treasurer Mandel is also committed to exploring new and innovative ways to make the Treasurer's Office more streamlined and efficient. He and his wife Ilana reside in the Cleveland area.

Tom Beith
Security Architect Director
Dell SecureWorks

Tom Beith, Security Architect Director for SecureWorks Enterprise SA's North America. Tom has been in Security, Cloud, Data Center leadership roles for the past 25 years at Auspex Systems, VERITAS, Symantec and Dell/SecureWorks. Tom's responsibilities have been to build, create, and support Field engineering teams which support small to medium, to Large Enterprise customers with Data Center, Security solutions, protection, compliance and services to protect customers Data.

Allison Binkley
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Allison Binkley focuses her practice on serving as bond counsel, underwriter's counsel and purchaser's counsel on general obligation financings, tax increment financings, utility revenue financings and special obligation financings. Her client base includes the State of Ohio, counties, municipalities, townships, port authorities, school districts, state universities, trustees, letter of credit banks, investment banking firms and financial institutions. Allison has also served as bond counsel on 501(c)(3) and health care conduit financings.

Allison has been recognized as an Ohio Super Lawyer Rising Star each year since 2012. Allison is a member of the Ohio Government Finance Officers Association, where she serves on the education committee. She is also a member of the National Association of Bond Lawyers, the Ohio State Bar Association and the Columbus Bar Association, where she serves on the Bar Admissions Committee.

Prior to beginning her legal career, Allison served as an economist for the Ohio Legislative Service Commission. In that position, she staffed the Senate Finance and Financial Institutions Committee for which she drafted amendments to and coordinated the State of Ohio's biennial operating and capital budget bills.

Jennifer Blaser
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With experience in many aspects of public finance law, Jennifer Blaser serves as bond and underwriters counsel in numerous traditional governmental financing transactions. Specifically, her focus includes working with cities, counties, townships and school districts throughout the State of Ohio to finance their capital projects.

As bond counsel, Jennifer has facilitated bond and note issues for traditional governmental projects such as primary and secondary education, fire and public safety buildings and equipment, building

improvements and libraries. Jennifer has also served as special counsel in connection with lease and lease-purchase financings.

Jennifer also assists a majority of the Columbus office's municipal clients with their SEC annual disclosure requirements.

Ms. Blaser is a frequent speaker at firm-sponsored client seminars, as well as for the Buckeye association of School Administrators, the Ohio Association of School Business Officials and the Ohio School Boards Association.

Jason Click, CFP
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Jason Click, CFP® is Vice President of Meeder Investment Management. Since 1974, Meeder Investment Management and its affiliates have provided comprehensive investment solutions to its clients. Meeder provides various investment advisory services to state and local governments in Ohio, as well as administrative and participant services to both STAR Ohio and STAR Plus.

Mr. Click holds a B.S. in Business/Finance from The Ohio State University and has obtained his CERTIFIED FINANCIAL PLANNER™ certification. He has extensive investment experience and brings over 15 years of industry experience to his position, having served in various management roles and financial advisory capacities throughout his career. He resides in Powell, Ohio with his wife and two sons.

Brian Cooper
Managing Director
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A twelve year veteran to the Public Finance and Economic Development arena Brian specializes in general obligation and revenue based project and public finance. Mr. Cooper financial matters that range from credit strategy, debt issuance and management, financial operations, capital planning and support, management review and budgeting and forecasting.

Brian serves the Ohio public finance market and has worked with issuers large and small including the City of Akron, Development Finance Authority of Summit County, City of Wadsworth, the City of Grandview Heights and City of Tallmadge, Upper Arlington and Dublin, Ohio. Brian has also worked with regional authorities such as the Solid Waste Authority of Central Ohio (SWACO) and State level issuers including the State Treasurer and the Ohio Public Facilities Commission. Mr. Cooper has completed over 120 distinct project financings representing over \$2.75 billion in financed projects.

Mr. Cooper graduated from the Ohio State University in 2001 and is registered as a municipal advisor with the Municipal Securities Rulemaking Board (MSRB) and the Securities and Exchange Commission (SEC). Mr. Cooper serves as a board member to the Ohio Tax Credit Authority and a trustee to the Worthington Education Foundation.

Mr. Cooper is a Columbus native, a member of the Columbus Chamber of Commerce and the Columbus Metropolitan Club and lives in Columbus, Ohio with his wife Patty and three boys, Alex, Calvin and Ivan (and yes, they are a handful!).

Chris Debo
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Chris Debo rejoined Schneider Downs in 2013 as Senior Manager in charge of our Columbus Technology Advisory Services practice. His 12 years of information technology experience includes six years of IT audit and security experience as well as multiple years of experience in software development, business intelligence, ERP implementations and project management. Chris has a broad background in all facets of information technology, including operations, systems implementations, data warehousing, cloud computing, and IT audit.

Recent experience includes roles as a technical implementation lead for a data warehousing consultancy in New York, as well as the Director of Business Intelligence for a publicly traded, multi-billion dollar company in Pittsburgh. He holds a Bachelor of Science in Management Information Systems and a Master of Accounting, both from The Ohio State University.

Steve Earley
Senior Manager, IT Audit and Risk Advisory Services
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Steve Earley is in charge of Schneider Downs' Columbus IT Audit and Risk Advisory Services practice. His 23 years in the information technology field includes over 11 years of IT audit and security expertise, as well as significant technical leadership experience across multiple business sectors including defense, healthcare, financial services, government and high technology.

Previously, Steve served as the head of IT operations for a secure DoD web collaboration service with Adobe, serving over 1 million users globally. Steve also served as the Chief Information Security Officer for the Ohio Department of Public Safety, as well as the founder of his own risk and security consulting business. He holds a Bachelor of Science in Business Administration (Accounting) from The Ohio State University, and a Master of Science in Information Technology Management from the Naval Postgraduate School in Monterey, California.

Angela M. Gillis, CPA, CIA, CGAP, CFSA
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Angela is a member of Schneider Downs' Internal Audit and Risk Advisory Services practice. She has 18 years of experience in accounting, auditing and consulting services.

In addition to providing outsourced internal audit services, her experience includes:

- Sarbanes Oxley compliance project management
- Enterprise and fraud risk assessments
- Business process reviews
- Corporate governance reviews
- SSAE 16 Service Organization Control (SOC) audits
- Internal Audit Quality Assessment Review (QAR)
- Internal audit department transformation/establishment Engagements

Additionally, Angela has conducted training seminars on: identity theft; forensic accounting, prevention, detection and investigation, enterprise risk management and proactive fraud prevention and controls.

James Giszczak
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Jim Giszczak is Vice Chair of the Litigation Department and Chair of the Data Privacy and Cybersecurity Practice Group. He advises clients regarding data security measures and responding to security breaches involving sensitive personal information and protected health information. He also works with clients in a myriad of industries to assess and implement appropriate data security safeguards. If a data breach occurs, Jim acts as a breach coach, ensuring compliance and minimizing exposure. Jim also works with federal, state and local authorities, as well as third party vendors. Moreover, Jim litigates matters involving data security and data privacy, including defending single plaintiff and class action litigation. Jim is a frequent speaker and writer in data privacy law and regularly conducts Incident Response Workshops for clients and their data breach risk management teams.

Jason Headings
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Jason Headings, CMT is Vice President and Portfolio Manager of Meeder Investment Management. Since 1974, Meeder Investment Management and its affiliates have provided comprehensive investment solutions to its clients. Meeder provides various investment advisory services to state and local governments in Ohio, as well as administrative and participant services to both STAR Ohio and STAR Plus.

Mr. Headings holds a B.S. in Finance and a B.S in Marketing from the Richard T. Farmer School of Business at Miami University. He has been with Meeder for over 8 years and is a Chartered Market Technician. Mr. Headings received the “Money Fund Intelligence Award” in 2011, 2012, and 2013 from Crane Data for providing the highest 1-year return among all prime retail money funds. He also received the “Top Manager Award” from iMoneyNet for his work on the money market fund in 2011. The Fund was recognized for producing the highest gross return in 2011 among money market funds with assets under \$1 billion, and greater than \$100 million. Mr. Headings resides in Dublin, Ohio.

Sara Jodka
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Sara regularly advises clients on social media, cyber smearing, workplace privacy, and the management, extraction, and authentication of electronically-stored information, including social media evidence. Sara has written numerous blogs and presented numerous seminars on these issues, and she has been featured on NBC 4, LexBlogTV numerous times, in Columbus Business First, and in various other media publications for her work in this area. If you suspect that your business has suffered a data breach, call our Hotline: 855-MH-DATA1 (855-643-2821).

Katie Johnson
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Katie Johnson focuses her practice on serving as bond counsel and underwriter's counsel on general obligation financings, tax increment financings, utility revenue financings and special obligation financings.

Katie also has experience working on a variety of economic development and public-private partnership projects. These projects have included the creation of tax increment financing areas, community reinvestment areas, enterprise zones, new community authority districts and joint economic development districts, all to encourage the investment of private capital in local communities and to stimulate economic development and redevelopment.

Katie is a member of the Ohio Government Finance Officers Association, National Association of Bond Lawyers, Ohio Women in Public Finance, Ohio State Bar Association and Columbus Bar Association, where she serves on the Bar Admissions Committee.

Dusten Kohlhorst
IT Director
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Dusten Kohlhorst is the IT Director for the Ohio Treasurer's Office and has nearly 20 years of experience in technology and project management. In his position, Dusten manages all aspects of the IT department including daily operations, website initiatives, internal & external security controls, cyber-security, and vendor management. Before the Ohio Treasurer of State's office, Dusten worked in project management at Nationwide Insurance and as Network Technology and Security Officer and Chief Information Officer at the Ohio House of Representatives.

Timothy N. McCabe
Senior Counsel & Chief Regulatory Officer
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Tim McCabe is Senior Counsel and Chief Regulatory Officer for the Ohio Treasurer of State. Tim has extensive experience in securities regulation and regulatory enforcement, having spent ten years in private practice at Curtis Mallet-Prevost, Colt & Mosle LLP in New York, NY, and two years as in-house counsel for a large bank/broker-dealer. Mr. McCabe received his B.A. from Connecticut College and his law degree from Fordham University School of Law.

Jim McCourt, CFA
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Jim McCourt, CFA, Vice President/Portfolio Manager, joined the fixed-income investment management team at United American Capital Corporation in June 2008 and has over ten years of financial industry experience. His primary duties include daily management of UACC's client portfolios and assisting in the development of the firm's overall fixed-income strategies. In addition, he is responsible for maintaining the performance records for the firm and conducting market research. Prior to joining UACC, Jim was a credit analyst in the Business Banking division at JPMorgan Chase. Mr. McCourt earned a B.S. degree from The Ohio State University and an M.B.A. from Capital University. He is also an active member of the CFA Institute and the CFA Society of Columbus.

Ashley Montgomery
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Ashley Montgomery is Deputy Legal Counsel in the office of the Ohio Treasurer of State. Ashley has worked in various capacities within state government for the last four years. The focus of her work in the Treasurer's office has included ethics, banking, and contracts. Ms. Montgomery received her B.A. from Ohio University and her law degree from the Ohio State University Moritz College of Law.

Caren Murdock, CPA, CIA, CISA, CFE, CRMP, CGMA
Chief Audit Executive
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Caren Murdock is the Chief Audit Executive for the Ohio Treasurer Josh Mandel's Office. She is a graduate of The Ohio State University and has more than 17 years of audit experience in the public sector. Ms. Murdock is a Certified Public Accountant, Certified Internal Auditor, Certified Information Systems Auditor, Certified Fraud Examiner, Chartered Global Management Accountant, and Certified Risk Management Professional.

Previously, she served as the chief of Internal Audit for the Ohio Bureau of Workers Compensation; assistant deputy director of fiscal services for the Ohio Job and Family Services; director of Internal Audit with the Ohio Attorney General's Office; special projects manager for the Ohio Department of Alcohol and Drug Addiction Services; senior internal auditor with the Ohio Department of Development; and staff accountant for the Ohio Auditor of State's Office.

Ms. Murdock has served on the Association of Government Accountants (AGA) Board since 2005. Currently, she is the Regional Vice President for the Great Lakes area and the Community Service Chair for Central Ohio AGA.

Walter Myers
Trust Director
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Walter Myers is the Trust Director of the Ohio Treasurer's Office and has 23 years of financial industry experience. In his position, Walter manages all aspects of the Trust department including book entry and physical collateral operations, custodial compliance, and investment operations and compliance. Previously, Mr. Myers was a Managing Director at JPMorgan's Commercial and Investment Bank. He held several positions through his tenure at JPMorgan including an expatriate assignment as Client Service head for Investor Service's European, Middle East and Africa Client Service organization. Just prior to joining the Ohio Treasurer's Office, Mr. Myers was responsible for a Columbus Ohio based institutional securities operations department including benefit payment services and institutional custody services.

Ryan Nelson, CFA
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Ryan is a Managing Principal and Portfolio Manager at RedTree Investment Group. He has over 20 years of investment experience in the fixed income markets. Specifically, over the past 13 years, Ryan has been assisting public entities and other agencies with their fixed income investment needs. At RedTree, he is responsible for overseeing the firm's investment process along with communication of the unique investment strategies for the firm's clients.

Ryan obtained his undergraduate degree in Accounting from the University of Kentucky and his MBA in Finance from Xavier University. He has received the Chartered Financial Analyst designation and is a current member of the CFA Institute. Ryan served as the Past President and Trustee for the CFA Society of Cincinnati. He is a current Board Member for Junior Achievement of Greater Cincinnati.

Donald R. Owens
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Don is the shareholder of Schneider Downs' Internal Audit and Risk Advisory Services practice in Ohio. His career spans more than 28 years in the profession. Don delivers SSAE 16 and SOC examinations, internal audit, Sarbanes-Oxley, forensic and other relevant risk advisory services (enterprise-wide risk and fraud risk assessments, process improvement reviews, etc.) to clients including government, non-profit, public and private entities. In addition to client service, Don is a lead member of the firm's quality advisory group, which performs research on the profession as well as its standards and authoritative materials. He routinely conducts training seminars on the topic of effective risk mitigation for professional organizations and clients.

Prior to joining Schneider Downs, Don worked for a regional builder where he headed the corporate risk management function and had direct responsibility for evaluating all business unit processes and controls. For a span of eight years, he was with the Advisory Services practice of PricewaterhouseCoopers LLP where, having risen to director in the practice, had responsibility for managing national and multinational engagements.

Dominic Paluzzi

Associate

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Dominic regularly advises clients regarding data privacy and cybersecurity measures, drafting of written information security programs and incident response plans, and responding to data security breaches involving sensitive personal information and protected health information. When a data breach occurs, Dominic acts as a breach coach, ensuring a client's compliance and minimizing their exposure. He also works with federal, state and local authorities, as well as third party vendors, throughout the breach notification process. Moreover, Dominic litigates matters involving data security and data privacy, including defending single plaintiff and class action litigation. His work in this area covers a myriad of industries, including, education, healthcare, hospitality, retail, automotive, accounting, finance, information technology, staffing services, manufacturing, professional employer organizations, fleet services, franchising, drug and pharmacy, and insurance. Dominic is a frequent speaker and writer in data privacy law and regularly conducts Incident Response Workshops for clients and their data breach risk management teams

Eric Prall

Managing Director

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Eric Prall serves as investment banker and financial advisor to municipal issuers, structuring new issue municipal bond financings, advance and current refunding issues, and other specialized financial modeling. Eric has vast experience structuring general obligation, revenue, certificates of participation, and other bond and note financings. He provides quantitative, analytical, and technical analysis for a variety of public clients, including, State level issuers, counties, municipalities, schools, villages, institutions of higher education, and health care systems. Mr. Prall has structured well over a billion dollars in municipal securities.

Eric provides also provides comprehensive investment management to a wide variety of public clients. Mr. Prall has years of experience managing investment portfolios for public entities and provides portfolio analysis, bond proceed management, and investment policy review.

Eric earned his Bachelor of Science Degree from the Fisher College of Business at The Ohio State University where he majored in finance. Mr. Prall holds the following FINRA licenses: Series 7, 63, 65, and 79.

Robert Reichley
Treasury Relationship Manager
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Robert Reichley joined the Office of Ohio Treasurer Josh Mandel in September, 2014 as a Relationship Manager. Robert came to the Treasurer's office from the commercial banking group of Fifth Third Bank in Columbus, Ohio where he worked as a Relationship Manager for Fifth Third Processing Solutions. Prior to Fifth Third, Robert worked as an ecommerce portfolio manager with JPMorgan Chase in their Paymentech Division. Robert holds a Bachelor of Arts degree from Bowling Green State University.

Tracy Smith
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Tracy recently joined the firm with an extensive 19-year background in governmental auditing and accounting. She has provided auditing and accounting services to more than 300 governmental entities, including assisting clients with financial statement and CAFR preparation. Tracy has managed staff on multiple concurrent audits of large, complex governmental agencies, including cities, counties, villages, school districts, libraries and special districts.

Tracy's area of specialization is governmental A-133 audits. She began her career in governmental auditing in 1994, serving governmental clients such as cities, counties, villages, school districts, and special districts. Tracy's primary responsibilities include managing and coordinating audit engagements, which includes working directly with the shareholder and members of the client's management team in developing and executing a risk-based audit approach. She serves on the Special Review Committee for the GFOA and will be reviewing CAFRs of municipalities and counties with revenues over \$250 million, postemployment benefit systems (pension and other), enterprise entities, states, colleges and universities, school districts and special districts.

Tracy obtained her Ohio School Treasurer's license in July 2012.

Eileen Stanic
Senior Public Funds Advisor
Meeder Investment Management

Eileen Stanic is a Senior Public Funds Advisor with Meeder Investment Management. She has over 30 years of treasury management and investment management experience including more than 10 years of Ohio public funds investment advisory experience. Over the years, she has presented at various Ohio public funds educational seminars and has experience as a CPIM instructor. Eileen is a graduate of Cleveland State University where she was the recipient of the Wall Street Journal Award. She is based in the greater Cleveland area and is a member of the CFA Institute and the CFA Society of Cleveland.

Since 1974, Meeder Investment Management and its affiliates have provided comprehensive investment solutions to its clients. Meeder provides various investment advisory services to state and local governments in Ohio, as well as administrative and participant services to both STAR Ohio and STAR Plus.

David C. Tiggett
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David Tiggett joined Fifth Third Securities, Inc. in July of 2010, after serving as the Assistant Director of Debt Management for the Office of the Ohio Treasurer of State. In his capacity with the State, his responsibilities were to oversee and manage debt issuance for the Ohio Treasury. His experience included the completion and/or participation in over \$500 million of State of Ohio bond issuances.

Previously, Mr. Tiggett worked at a Regional Investment Bank where his underwriting experience included working with Ohio school districts and municipalities with the issuance of voted general obligation issues, un-voted general obligations, collaborative financings, private placements and certificates of participations. While there he facilitated over \$200 million in issuances. Over the past four years, he has worked on or participated in over \$3.0 billion in municipal financings.

Mr. Tiggett began his banking career in 1995 with a major Ohio Regional Commercial Bank. Mr. Tiggett received a Bachelor of Science degree from The Ohio State University. He is licensed as a FINRA Registered Representative (Series 7 and Series 63 licenses).

Dana Wasserman
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Dana Wasserman has been with the Ohio Treasurer's office since Treasurer Mandel was sworn in, on January 10, 2011, and serves as the Director of the Office of Debt Management. In her role at the Treasurer's office, she oversees both debt issuance for the state, as well as debt administration, or debt service, on all of the state's General Revenue Fund-supported obligations. Ms. Wasserman received her Bachelor's degree from Miami University of Ohio and her Master's degrees in Finance and Business Administration from the University of Denver.

Susan Willeke
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Susan M. Willeke joined the Ohio Ethics Commission in 2005 as the Education & Communications Administrator where she oversees and conducts educational and communication outreach. Prior to joining the Commission, Ms. Willeke served for eleven years in the communications office at the Ohio Environmental Protection Agency and has also served as a legislative aide in the Ohio House of Representatives. Ms. Willeke is a Summa Cum Laude graduate of Ursuline College in Pepper Pike, Ohio.

Dennis Yacobozzi
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Dennis Yacobozzi is the President of United American Capital Corporation (UACC), a registered investment advisor specializing in the management of public funds. Founded in 1991, UACC provides investment management services to public entities throughout Ohio and California. The firm's managed assets include counties, municipalities, school districts, and other public entities.

United American Capital is a recognized name in the area of public funds. With public funds under management exceeding \$3 billion, UACC is the largest firm in Ohio to exclusively manage the investments of public entities.