



STREAM

STREAM STUDENT SUMMIT

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Thursday, October 13, 2022, | 2-6 pm

The Hughes - Trigg Student Center

[Registration Link](#)

info@streamdallas.org | <https://www.streamdallas.org/>

AGENDA

- | | |
|-----------|--|
| 1:45-2:00 | <u>Check-In</u> |
| 2:00-2:10 | <u>Welcome</u>
Jason Rife – Career Management & Graduate Admissions at SMU Cox School of Business
Ellis Thomas – Executive Director, STREAM Foundation |
| 2:10-2:45 | <u>Venture Capital</u>
Moderator: David Evans – Managing Partner, Sentiero Ventures
Panelists:
Ansley Carlisle – Associate, Mark Cuban Companies
Blake Wiley – Co-Founder, Access Capital |
| 2:45-3:20 | <u>Private Equity & Real Assets</u>
Moderator: Sam Rogers – Managing Director & Co-Founder, Trialta
Panelists:
Wade Caston – Vice President of Investments, Grey Rock Energy Partners
Rootvik Patel – Managing Director, Investments, Civitas Capital Group
Lindsay Pistor – Vice President, Delta-v Capital |
| 3:20-3:30 | Break |
| 3:30-4:05 | <u>Public Equities Analyst Panel</u>
Moderator: Mac McNerny – Vice President of Institutional Equities, Morgan Stanley
Panelists:
Brandon Dean – Associate, AFO Capital
Devin Holland – Analyst, Ranger Investment Management
Shawn Lee – Partner and Senior Analyst, Lynwood Price Capital |
| 4:05-4:35 | <u>Professionalism</u>
Camille McBride – Managing Director, Dagen Personnel |
| 4:35-4:55 | <u>Keynote</u>
William A. Ampofo II – Vice President, Parts & Distribution Services and Supply Chain, Boeing Global Services Chair, Supply Chain Operations Chair |
| 4:55-5:00 | <u>Closing Remarks</u>
Somer Washington – Audit Managing Director, KPMG |
| 5:00-6:00 | <u>Career Fair</u>
Alt +Co, Cambridge Associates, Canyon Partners, Delta-v, Fidelity, GEM, Hudson Way, Insperity, Ranger Investments, Regan Capital, STREAM Foundation, TRS |

Keynote Speaker



William A. Ampofo II leads the Parts & Distribution Services business for Boeing Global Services, which includes the legacy Boeing Distribution Inc., Boeing Distribution Services Inc., Commercial Proprietary Parts and Commercial Managed Parts portfolio.

Ampofo also leads the Global Services Supply Chain function, a division with operations in over 70 countries and more than 300 locations around the world. In this capacity, he leads all aspects of the supply chain function, including distribution and component and engine maintenance, repair and overhaul (MRO), and is responsible for delivering high-quality, efficient and repeatable service offerings to the end customer.

In addition, Ampofo serves on the the company's Executive Council in his capacity as the Boeing Supply Chain Operations Council Chair. In this role, he is responsible for driving supply chain functional excellence across the enterprise through people, processes and tools, as well as ensuring Boeing remains focused on its next-generation production system and services operational life cycle.

Ampofo previously served as vice president for the Business Aviation, General Aviation & OEM Services business unit organization, where he held profit and loss responsibilities, successfully establishing Boeing as a market leader in this sector. Ampofo joined the company as senior vice president of Global Operations and Supply Chain for Aviall, a Boeing subsidiary, where he was responsible for operations, supply chain, capital facilities, global repair services, quality and the chemical management business.

Before joining The Boeing Company in April 2016, Ampofo spent 22 years at United Technologies Corporation (UTC), holding roles of increasing responsibility in finance, information technology, corporate strategy and operations at its corporate headquarters and its Pratt & Whitney, Sikorsky and UTC Aerospace Systems (UTAS) divisions. While at UTAS, Ampofo served as vice president of Supply Chain, Commodity and Cost Management, responsible for leading its One-Company Supply Chain initiative and driving sourcing and cost reduction strategies across its \$5 billion supply base.

Ampofo is a member of Executive Leadership Council and currently serves on the board of directors for the General Aviation Manufacturers Association and the Dallas Regional Chamber as well as the board of trustees for Cheshire Academy in Cheshire, Connecticut. In addition, he is a past advisory board member for Howard University's Center of Excellence in Supply Chain Management.

Ampofo has a bachelor's degree in finance from Adelphi University and a Master of Business Administration from George Washington University. He has completed executive education coursework at the University of Virginia Darden School of Business, Institut Supérieur de Gestion in Paris and INSEAD.

Speaker Bios



Jason Rife is the Senior Assistant Dean of the Career Management Center and Graduate Admissions at SMU's Cox School of Business as well as a Professor of Practice for Business Communications. He graduated with his BBA from Texas Tech University and worked with ExxonMobil in project management and finance before completing his MBA at Duke University's Fuqua School of Business. Post-MBA, Jason moved into strategy and marketing roles with John Deere and later became a strategy consultant with McKinsey & Company. At both Deere and McKinsey, Jason volunteered to serve on the MBA recruiting teams, interviewing candidates and supporting the identification and onboarding of talent from top-tier business schools. Jason's love of recruiting and coaching students led him to make the jump from consulting to higher education, joining the University of Florida as an MBA career coach and eventually leading their graduate business career services team. In 2019, Jason returned to Texas as a part of the SMU Cox team. In addition to his roles at SMU, Jason has also coached numerous winning MBA case competition teams and co-authored *Case In Point: Case Competition*, a guide to creating strategy presentations for competitions and interviews. He lives in McKinney with his wife and daughter.



Ellis Thomas is Co-Founder & Executive Director of STREAM. She graduated from Auburn University with a Bachelor of Science in Education and was an educator at Metropolitan Day School, a charter school in Northeast Washington, DC, before moving to Dallas and teaching in the Dallas Independent School District. She is involved with many charitable organizations and social advocacy groups focused on education, mental health and the arts. Ellis' background in education aligns with STREAM's mission of training, educating and mentoring students from a young age in order to establish and maintain their success in the future.



David Evans is the Managing Partner of Sentiero Ventures, an early-stage venture fund that invests in artificial intelligence enabled software businesses. He is a serial entrepreneur & technologist who started coding at 14, launched his first company at 19, and has exited multiple times as a founder and investor, including a national digital signage network that was sold to CBS and an Inc 500 eCommerce company that was sold to a strategic buyer. In addition, David is the facilitator of the CometX Accelerator for student entrepreneurs at the University of Texas at Dallas, a Consultant for the Stamford Startup Studio at the University of Connecticut, and works as an advisor to multiple startups and accelerators. David also sits on the Mentor Committee of the United Way Social Innovation Accelerator, an organization dedicated to finding, funding, and supporting the most innovative programs to help promote health, education, and income in Dallas' least served communities. He's also on the Steering Committee of Venture Dallas, the premier hub for venture innovation on North Texas and the Research and Innovation Council for the University of Texas at Dallas. David is a graduate of the University of Connecticut, a former Beneficial Hodson Scholar at Johns Hopkins University, holds a Certificate in Corporate Finance from Harvard University.



Ansley Carlisle is an Associate at Mark Cuban Companies in Dallas, Texas. Her responsibilities include due diligence, deal sourcing, and portfolio company support. Before entering VC, she worked as an Environmental Engineer at ExxonMobil in Houston, Texas. She graduated from Spelman College's Dual Degree Engineering Program, earning a B.S. in Chemistry from Spelman and a B.S. in Environmental Engineering from Columbia University.



Blake Wiley is a Co-founder of Access Capital which primarily invests in emerging consumer-facing brands in high growth categories. Access currently has 28 portfolio companies with \$10 million to \$500 million in annual revenue across the food, beverage, personal care, pet, and apparel industries. Mr. Wiley has served as a board director, investor, and advisor in several high-profile brands from seed stage to successful exit. Blake lives in Dallas with his wife, Eve, and their 3 kids. In his limited free time, he enjoys coaching his kids' sports teams, supporting the Texas Longhorns, and turning down invitations to play golf. He also serves on the Board of Directors for the Goodyear Cotton Bowl and Venture Dallas. He is a member of the TouchDown Club of Dallas benefitting The Rise School and volunteers at the Genesis Women's Shelter and Ronald McDonald House of Dallas.



Sam Rogers is a Managing Director and Co-Founder of Trialta. He has fourteen years of professional experience, nearly all of it spent in financial due diligence. Most recently, he led the Consumer, Food, and Retail practice within Transaction Services at Houlihan Lokey. In addition to these industries, he has spent considerable time in other sectors, including industrials, environmental services, and distribution. Prior to Houlihan Lokey, Sam was a Director in KPMG's diligence practice, spending most of his time in Boston. Sam attended the University of Texas for his undergraduate and accounting masters, graduating with degrees in accounting, economics, and Plan II Honors. Sam and his wife Kelly live in Dallas with their two sons, Jack and Nate, and he spends his free time snow skiing and watching the boys play youth soccer.



Wade Caston is a Vice President at Grey Rock Investment Partners. Mr. Caston helps with portfolio management, financial analysis and reporting, and investment due diligence on the Natural Resources and Net Zero Opportunities Fund. Previously, Mr. Caston worked at PricewaterhouseCoopers in the Capital Markets practice. During his tenure at PwC, he provided consulting services on mergers, acquisitions, debt offerings, and IPOs for communications and upstream oil and gas companies. Mr. Caston holds a BS in Business Administration from the University of Arkansas and a MS in Accounting from Texas Christian University.



Rootvik Patel is an experienced real estate investment professional and a senior member of the Investments team at Civitas. At Civitas, Mr. Patel leads the firm's investment team that focuses on acquiring and developing multifamily properties and other selective investment opportunities. Mr. Patel brings over 14 years of experience in real estate investments and has completed transactions throughout the capital stack within the multifamily, senior housing, office, and hospitality sectors. In his time at Civitas, Mr. Patel has originated, underwritten, and closed more than \$1 billion in real estate transactions. Mr. Patel also serves as a voting member on the firmwide Investment Committee. Mr. Patel was previously an Investment Manager with Headington Companies, a Dallas-based family office, where he managed over \$300 million in real estate assets in hospitality, multifamily, and healthcare. Mr. Patel sourced and underwrote deals, helped configure debt, equity and partnership structures, and enhanced value of portfolio holdings through asset management. Prior to joining Headington Companies, Mr. Patel was an Investment Associate with Northern Trust, a top global financial services and investment management firm. Mr. Patel holds a Master of Business Administration from Southern Methodist University and a Bachelor of Business Administration from The University of Texas.



Lindsay Pistor is a Vice President at Delta-v Capital. Previously, she was the Director of Strategy and Finance at Compass Professional Health Services, a leading provider of healthcare navigation software and services. There, Lindsay led the financial operations and managed strategic planning as Chief of Staff to the CEO. She helped lead the process to sell the company to Alight Solutions, an HR outsourcing company based in Chicago. Previously, she worked at JP Morgan Chase as an analyst, structuring credit for the middle market. Lindsay completed her MBA at The Wharton School with a management focus, specifically in entrepreneurship and innovation. She also holds a BBA in Business Honors and Finance from The University of Texas.



Mac McInerney is Vice President of Institutional Equities for Morgan Stanley based in Dallas, Texas. He has been with Morgan Stanley for 6 years. Prior to Morgan Stanley, Mac spent 3 years with Jefferies, LLC also in Institutional Equities. In his role, Mac works with a team to facilitate the firm's business with Hedge Funds, Mutual Funds, Family Offices, and other institutional investment managers in the State of Texas. Mac is currently pursuing a Professional MBA at SMU with concentration in Leadership and Organizational Theory. Prior to his career, Mac attended the University of the South: Sewanee for Undergrad where he majored in Economics with a Business minor. During his time in college Mac interned with JP Morgan Securities in San Francisco (Private Wealth Management) and Montag & Caldwell in Atlanta (Institutional Investment Management). Mac is a Board Member of Capital for Kids Connect Charity and also enjoys volunteering as a foster dog host for Hearts & Bones Animal Rescue from time to time.



Brandon Dean is a Dallas Texas native who obtained his BS in Accounting at Susquehanna University and his MBA from SMU with a concentration in Finance and Real Estate. Currently, he is an Associate on the AFO Capital investment team and assists the team on evaluating fund managers and making investment recommendations for the AFO portfolio. Prior to joining AFO, Brandon interned at Webs Creek Capital, as a STREAM intern, while he was finishing up his final year of his MBA program. Before entering the SMU MBA program, he worked in operational and accounting roles at various hedge funds in Irvine, CA and Dallas, TX. Brandon is currently a member of the Social Venture Partners – Dana Juett Residency Program, which focuses on helping individuals learn how to create social impact earlier in their lives.



Devin Holland joined Ranger Investments in 2015 as an associate trader. She added research responsibilities to her role in 2020 and was promoted to analyst in 2021. Devin's primary research focus is on the consumer discretionary and consumer staples industries. She is on the Diversity, Equity and Inclusion (DEI) committee.

Devin graduated Cum Laude with a bachelor of arts degree in political science from Davidson College.



Shawn Lee is a Partner and Senior Analyst at Lynwood Price Capital Management. Prior to joining Lynwood Price Capital Management, Shawn was a Director of Finance and Strategy at ATW, an industrial company sponsored by Bain Capital. Prior to joining ATW, Shawn spent five years as an investment professional. He was an Analyst at Karlin Direct Investments, the public equity division of a LA-based single-family office Karlin Asset Management. Prior thereto, Shawn was an Analyst at Highland Capital, a credit-oriented hedge fund. Shawn began his career in investment banking, where he was an analyst in the mergers & acquisitions division at Lazard Frères & Co. and the leveraged finance division at Barclays Capital. Shawn holds a B.A. degree in Finance from the McCombs School of Business at The University of Texas at Austin.



Camille McBride is a Managing Director at Dagen Personnel. She focuses on elevating careers to the next level and being a trusted advisor to clients and candidates. She has more than 25 years of global macro hedge fund experience. Previously she served as the Global Director of Operations for HBK Capital Management, where she managed the growth and automation of the department while creating a culture of community and inclusivity. Camille holds a BBA in Accounting from Abilene Christian University. She lives in Dallas with her husband, two cats, and an Australian Shepherd. She has one daughter who is a recent graduate of the McCombs School of Business at the University of Texas in Austin and now resides in New York. Camille spends her spare time reading books and listening to podcasts. A lover of animals, she supports Dog and Kitty City, her local no-kill shelter.



Somer Washington, began her career at Ryan, where she assisted Fortune 500 companies with sales and use tax audit defense. In 2006, Somer joined Rothstein Kass, a public accounting firm, which specialized in the asset management industry, and was responsible for audit and tax service offerings for entities in the asset management industry. Somer joined KPMG as part of their acquisition of Rothstein Kass in July 2014. Somer is currently a Managing Director in KPMG's Dallas Asset Management practice. Somer has 15 years of curating preeminent client experiences for clients in the investment management industry.

Somer's passions outside of the firm include serving as Advisory Board Member to several organizations, volunteer GED instructor with the Dallas Public Library and serving as local Internal Audit Chair for a national service sorority.

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