

FOCUS: WHO'S WHO IN BANKING & FINANCE

**JONATHAN AMOIA**

Partner/director, Sandhill Investment Management

- **Contact:** 360 Delaware Ave., Buffalo, NY 14202 jamoia@sandhill-im.com • 716-852-0279
- **Joined firm:** 2014
- **College:** MBA, Simon Business School, University of Rochester
- **Born in:** Las Vegas
- **Lives in:** Clarence
- **Spouse:** Rachel
- **Children:** Giana, Matteo, Adriana
- **Favorite nonprofits:** Albright-Knox Art Gallery, SUNY Buffalo State, Kenmore Mercy Hospital
- **Self-description:** Grateful

**JOHN BECKER JR.**

Branch manager, HB&O Funding Co.

- **Contact:** 3907 N. Buffalo Road, Orchard Park, NY 14127 • johnbecker@hbofunding.com 716-662-2944
- **Joined firm:** 2005
- **College:** Clarkson University
- **Professional designations:** CRMS
- **Born in:** Lake View
- **Lives in:** Orchard Park
- **Children:** Reino, Sloan
- **Favorite nonprofits:** Cystic Fibrosis Foundation; Ride for Roswell, Make-A-Wish Foundation
- **Self-description:** Versatile

**JAY BERUBE**

Executive director, UBS Financial Services Inc.

- **Contact:** 250 Delaware

Ave., Buffalo, NY 14202 • jay.berube@ubs.com 716-849-3850

- **Joined firm:** 2000
- **College:** B.S., Providence College
- **Professional designations:** CIMA
- **Born in:** Fall River, Mass.
- **Lives in:** Buffalo
- **Favorite nonprofits:** SPCA, YMCA Buffalo Niagara, Hospice
- **Self-description:** Maximizer

**MARTIN BIRMINGHAM**

President/CEO, Financial Institutions Inc. and Five Star Bank

- **Contact:** 220 Liberty St., Warsaw, NY 14569 mkbirmingham@five-starbank.com 585-627-1321
- **Joined firm:** 2005
- **College:** B.A., St. Lawrence University; MBA, Simon Business School, University of Rochester
- **Born in:** Rochester
- **Lives in:** Pittsford
- **Spouse:** Jill
- **Children:** Annie, Tommy
- **Favorite nonprofits:** United Way, St. John Fisher College, Wyoming County YMCA
- **Self-description:** Tenacious

**DANIEL BLAKE**

CEO/owner, Southtowns Financial Group Inc.

- **Contact:** 3438 Orchard Park Road, Orchard Park, NY 14127 • dan@familyvalu.com 716-662-0070
- **Joined firm:** 1994
- **College:** B.S., Canisius College; MBA, National University
- **Certifications:** CFBS, CFP, MS
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Spouse:** Susan
- **Favorite nonprofits:**

Food Bank of WNY

**ROBERT BOJDEK**

Executive vice president/chief credit officer, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 2002
- **College:** Georgetown University, University of Michigan
- **Lives in:** Buffalo

**ROSANNE BRAXTON**

President/owner, Level Financial Advisors

- **Contact:** 1412 Sweet Home Road, Amherst, NY 14228 • rbraxton@levelfa.com • 716-634-6113
- **Joined firm:** 1987
- **College:** B.S., business, management and economics, Empire State College
- **Professional designations:** CFP(r)
- **Born in:** Attica
- **Lives in:** Snyder
- **Spouse:** James
- **Children:** Amanda, Ashley, Michele, Ariel, Shannon
- **Favorite nonprofits:** Northtowns Boys & Girls Clubs, Junior League of Buffalo, Lancaster YMCA
- **Self-description:** Caring

**ROBERT CASTIGLIONE**

Partner, WNY Asset Management

- **Contact:** 6500 Sheridan Drive, Williamsville, NY 14221 rcastiglione@wnyasset.com • 716-626-0060
- **Joined firm:** 2004

- **College:** B.S., Canisius College; MBA, Boston College
- **Professional designations:** CFP
- **Born in:** Rochester
- **Lives in:** Wheatfield
- **Spouse:** Kim
- **Children:** Joseph, Nicholas
- **Favorite nonprofits:** Juvenile Diabetes Research Foundation, Women & Children's Hospital of Buffalo, Centro Culturale Italiano di Buffalo
- **Self-description:** Driven

**LOUIS CERCONI**

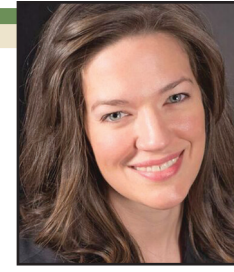
Partner, Brisbane Consulting Group LLC

- **Contact:** 369 Franklin St., Buffalo, NY 14202 lcercone@briscon.com 716-856-3300
- **Joined firm:** 1993
- **College:** B.S., accounting, Daemen College
- **Professional designations:** CPA, CFE, CFF, ABV, ASA, CVA
- **Born in:** Buffalo
- **Lives in:** Tonawanda
- **Spouse:** Debbie
- **Children:** Kristen, Louis, Kelly
- **Favorite nonprofits:** Catholic Charities, St. Jude Children's Research Hospital, Roswell Park Cancer Institute
- **Self-description:** Papa

**JANET COLETTI**

Executive vice president, human resources, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 1985
- **College:** Mount Holyoke College
- **Lives in:** Buffalo

**LAURA COOLEY**

Retirement plan adviser, Lawley Retirement Advisors LLC

- **Contact:** 361 Delaware Ave., Buffalo, NY 14202 • acooley@lawleyretirement.com 716-849-4370
- **Joined firm:** 2017
- **College:** B.S., University at Buffalo
- **Born in:** Buffalo
- **Lives in:** West Seneca
- **Spouse:** Ray
- **Children:** Katelyn, Claire
- **Favorite nonprofits:** The National Academy of Finance, Gerard Place, WNY Women's Foundation
- **Self-description:** Motivated

**GARY COSCIA**

President/CEO, Largo Real Estate Advisors Inc.

- **Contact:** 2420 N. Forest Road, Getzville, NY 14068 • gcoscia@largocapital.com 716-204-2200
- **Joined firm:** 1989
- **College:** B.S., SUNY Oswego
- **Born in:** Niagara Falls
- **Lives in:** Williamsville
- **Children:** Kevin, Kellie, Connor
- **Favorite nonprofits:** Bison Children's Scholarship Fund, American Red Cross, Leukemia and Lymphoma Society
- **Self-description:** Entrepreneur

**MARY ANN COULSON**

Senior vice president/branch manager, Morgan Stanley

- **Contact:** 50 Fountain

Plaza, Buffalo, NY 14202 mary.ann.coulson@morganstanley.com 716-849-4884

- **Joined firm:** 1998
- **College:** B.S., North Carolina State University
- **Professional designations:** CRPC, CDFIA
- **Born in:** Fort Campbell, Ky.
- **Lives in:** Orchard Park
- **Spouse:** David
- **Favorite nonprofits:** Buffalo Prep, The Gow School, The United Way
- **Self-description:** Enthusiastic

**SARA DAYTON**

Partner, Lumsden & McCormick LLP

- **Contact:** 369 Franklin St., Buffalo, NY 14202 • sdayton@LumsdenCPA.com • 716-856-3300
- **Joined firm:** 1998
- **College:** B.S., accounting, SUNY Geneseo
- **Professional designations:** CPA
- **Born in:** Paris, France
- **Lives in:** Buffalo
- **Spouse:** Andy
- **Children:** stepdaughter Kayla
- **Favorite nonprofits:** SPCA Serving Erie County, South Line Fire Co., Joyful Rescues
- **Self-description:** Competitive

**SHERRY DELLEBOVI**

Partner, Lumsden & McCormick LLP

- **Contact:** 369 Franklin St., Buffalo, NY 14202 • sdellebovi@lumsdencpa.com 716-856-3300
- **Joined firm:** 1985
- **College:** B.S., accounting, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Rochester
- **Lives in:** Buffalo
- **Favorite nonprofits:**

FOCUS: WHO'S WHO IN BANKING & FINANCE

UB Center for Entrepreneurial Leadership, Ride for Roswell, The Moynihan Fund (named for former NYSSCPA President David Moynihan)



ANTHONY DELMONTE JR.

President/CEO, Bank of Akron

- ▶ **Contact:** 46 Main St., Akron, NY 14001 • tdelmonte@bankofakron.com 716-542-5401
- ▶ **Joined firm:** 2009
- ▶ **College:** B.A., University at Buffalo; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Clarence Center
- ▶ **Spouse:** Sheila
- ▶ **Children:** Abigail, Dominick
- ▶ **Favorite nonprofits:** Catholic Charities of Buffalo, Detective Wasyl Potienko Memorial Foundation



DALE DEMYANICK

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202 ddemyanick@lumsdencpa.com 716-856-3300
- ▶ **Joined firm:** 1978
- ▶ **College:** B.S., accounting, Daemen College
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Snyder
- ▶ **Spouse:** Patty Smith
- ▶ **Children:** Alice, Beth, Kate
- ▶ **Favorite nonprofits:** Daemen College, WNY Heritage magazine, Ronald McDonald House
- ▶ **Self-description:** Conscientious



ADAM DESMOND

Buffalo regional market leader, Tompkins Bank of Castile

- ▶ **Contact:** 90 Main St., Batavia, NY 14020 • adesmond@tompkinsfinancial.com 716-426-6052
- ▶ **Joined firm:** 2017
- ▶ **College:** B.S., University at Buffalo; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives on:** Grand Island
- ▶ **Spouse:** Carin
- ▶ **Children:** Luca, Rocco
- ▶ **Favorite nonprofits:** Literacy New York, Buffalo-Niagara Inc., Meals on Wheels for Western New York Inc., Crohn's and Colitis Foundation
- ▶ **Self-description:** Determined



BRIAN DONAHUE

Chief banking officer, Community Bank Systems, Inc.

- ▶ **Contact:** 5790 Widewaters Parkway, DeWitt, NY 13214 brian.donahue@communitybankna.com 315-445-7339
- ▶ **Joined firm:** 1992
- ▶ **College:** B.B.A., business, St. Bonaventure University
- ▶ **Born in:** Olean
- ▶ **Lives in:** Orchard Park
- ▶ **Children:** Chris, Sean
- ▶ **Favorite nonprofits:** Roswell Park Cancer Institute, Cattaraugus County Rehab, SBU
- ▶ **Self-description:** Driven



SHELLEY DRAKE

Senior vice president, M&T Charitable Foundation;

president, M&T Bank

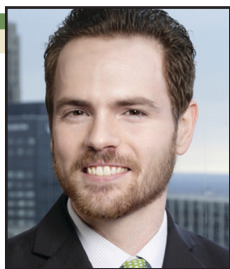
- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 1972
- ▶ **College:** University at Buffalo
- ▶ **Lives in:** Buffalo



JAMES DUNN

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202 jdunn@lumsdencpa.com • 716-856-3300
- ▶ **Joined firm:** 1987
- ▶ **College:** B.S., accounting, Canisius College
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Tonawanda
- ▶ **Spouse:** Paula
- ▶ **Self-description:** Happy



STEVEN ELWELL

Partner/vice president, Level Financial Advisors

- ▶ **Contact:** 1412 Sweet Home Road, Amherst, NY 14228 • selwell@levelfa.com • 716-634-6113
- ▶ **Joined firm:** 2007
- ▶ **College:** SUNY Alfred State
- ▶ **Professional designations:** CFP
- ▶ **Born in:** Hornell
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Breanna Pugh
- ▶ **Favorite nonprofits:** Upstate NY Lupus Alliance, Ronald McDonald House of WNY, Big Brothers Big Sisters
- ▶ **Self-description:** Ambitious



THOMAS EMMERLING

CEO, Dopkins & Co. LLP

- ▶ **Contact:** 200 International Drive, Buffalo, NY 14221 temmerling@dopkins.com • 716-634-8800
- ▶ **Joined firm:** 1974
- ▶ **College:** Canisius College
- ▶ **Professional designations:** CPA, CFP
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Carol
- ▶ **Children:** Patrick, Thomas
- ▶ **Favorite nonprofits:** Aspire of Western New York, Canisius College, Buffalo Niagara Partnership



MICHAEL EMSER

Financial adviser, Wealth, Future Inc.

- ▶ **Contact:** 2306 Wehrle Drive, Williamsville, NY 14221 • memser@unitedplanners.com 716-633-1999
- ▶ **Joined firm:** 1987
- ▶ **College:** B.S., SUNY Fredonia
- ▶ **Professional designations:** CFP
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Lancaster
- ▶ **Children:** Eric, Michelle
- ▶ **Favorite nonprofits:** Food Bank of WNY, Autism Services of WNY, Eastern Hills Wesleyan Church
- ▶ **Self-description:** Competent



JULIE ENDERS

Private banker, Wilmington Trust

- ▶ **Contact:** One Fountain Plaza, Buffalo, NY 14203 • jenders@wilmingtontrust.com 716-848-7123

- ▶ **Joined firm:** 1992
- ▶ **College:** University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Favorite nonprofits:** Buffalo City Mission, SPCA Serving Erie County, Food Bank of WNY



PATRICIA FARRELL

Market manager, Wilmington Trust

- ▶ **Contact:** One Fountain Plaza, Buffalo, NY 14203 • pfarrell@wilmingtontrust.com 716-848-7331
- ▶ **Joined firm:** 2014
- ▶ **College:** B.S., University at Buffalo; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** Bison Children's Scholarship Fund, Mount Mercy Academy, Sisters of Mercy



JAMES FASHANO

President, Alliance Advisory Group Inc.

- ▶ **Contact:** 600 Delaware Ave., Buffalo, NY 14202 james.fashano@allianceadvisorygroup.com • 716-912-4042
- ▶ **Joined firm:** 1995
- ▶ **College:** B.S., finance and economics, Gannon University
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Rachel
- ▶ **Children:** Robert, Michael, Luciana
- ▶ **Favorite nonprofits:** Buffalo City Mission, St. Jude Children's Research Hospital, March of Dimes



RACHEL FOLEY

Chief financial officer/treasurer, Lake Shore Savings Bank

- ▶ **Contact:** 128 E. Fourth St., Dunkirk, NY 14048 • rachel.foley@lakeshoresavings.com 716-366-4070
- ▶ **Joined firm:** 1999
- ▶ **College:** B.S., economics, Allegheny College; MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Fredonia
- ▶ **Spouse:** Timothy Murphy
- ▶ **Favorite nonprofits:** Mikey's Way, Dunkirk Library, Dunkirk-Fredonia Meals on Wheels
- ▶ **Self-description:** Dedicated



NICKOLE GARRISON

Senior private client adviser, Wilmington Trust

- ▶ **Contact:** One M&T Center, Buffalo, NY 14203 • ngarrison@wilmingtontrust.com 716-848-7590
- ▶ **Joined firm:** 2012
- ▶ **College:** B.S., Binghamton University
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Binghamton
- ▶ **Lives in:** East Aurora
- ▶ **Children:** Adam, Emily
- ▶ **Favorite nonprofits:** Buffalo Center for Arts and Technology, Buffalo Olmsted Parks Conservancy, Explore & More Children's Museum
- ▶ **Self-description:** Connector



F. JAMES GINNANE

Managing member, Planned

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Futures Financial Group LLC

- **Contact:** 300 Corporate Parkway, Amherst, NY 14226 • jginnane@financialguide.com • 716-632-4200
- **Joined firm:** 1997
- **College:** B.S., Nlagara University
- **Professional designations:** CLU, ChFC, CFP
- **Born in:** Kenmore
- **Lives in:** East Amherst
- **Spouse:** Judy
- **Children:** Amy, Christien, Tracy
- **Favorite nonprofits:** Niagara University, Catholic Charities, Roswell Park Cancer Institute



RICHARD GOLD

Vice chairman, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 1989
- **College:** Cornell University, New York University Stern School of Business
- **Lives in:** Buffalo



JOHN GOLDING

New York region president, Northwest Bank

- **Contact:** 295 Main St., Buffalo, NY 14203 • john.golding@northwest.com • 716-854-2265
- **Joined firm:** 2016
- **College:** North Carolina Wesleyan College
- **Born in:** New York City
- **Lives in:** Buffalo
- **Spouse:** Liz
- **Children:** Grace
- **Favorite nonprofits:** Leukemia & Lymphoma Society, Westminster Economic Development Initiative, United Way of Buffalo & Erie County
- **Self-description:** Optimistic



DONNA GONSER

Partner, Lumsden & McCormick LLP

- **Contact:** 369 Franklin St., Buffalo, NY 14202 • dgonser@lumsden CPA.com • 716-856-3300
- **Joined firm:** 1982
- **College:** B.S., accounting, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Hamburg
- **Spouse:** Robert
- **Children:** Ryan, Christopher, Nicholas
- **Favorite nonprofits:** Catholic Charities of Buffalo, United Way of Buffalo & Erie County, Parent Network of WNY
- **Self-description:** Unique



PATRICK GORMAN

Vice president, commercial banking, Community Bank NA

- **Contact:** 5 Clark St., Orchard Park, NY 14127 • patrick.gorman@communitybankna.com • 716-253-4765
- **Joined firm:** 2011
- **College:** B.S., University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Orchard Park
- **Spouse:** Paula
- **Children:** Cassandra, Thomas, Patrick
- **Favorite nonprofits:** Orchard Park Boys & Girls Club, Buffalo City Mission, SPCA
- **Self-description:** Effective



MARTIN GRIFFITH

President, Bank on Buffalo

- **Contact:** 535

Washington St., Buffalo, NY 14203 • martin.griffith@bankonbuffalo.bank • 716-235-5948

- **Joined firm:** 2016
- **College:** B.S., Ithaca College
- **Born in:** Batavia
- **Lives in:** Clarence Center
- **Spouse:** Amy Jo
- **Children:** Taylor Leigh, Samantha Jo
- **Favorite nonprofits:** Food Bank of WNY, St. Mary's School for the Deaf, Shea's Performing Arts Center
- **Self-description:** Passionate



MICHAEL GRIMALDI

Partner, Lumsden & McCormick LLP

- **Contact:** 369 Franklin St., Buffalo, NY 14202 • mgrimaldi@lumsden CPA.com • 716-856-3300
- **Joined firm:** 1990
- **College:** B.S. Accounting, Northern Ohio University
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Lake View
- **Spouse:** Anne
- **Children:** Eric, Kevin, Jocelyn
- **Favorite nonprofits:** Rotary Club of Buffalo, St. Mary's School for the Deaf, St. John Paul II Parish, Lake View
- **Self-description:** Reliable



THOMAS GROGAN

Managing partner, Brock, Schechter & Polakoff LLP

- **Contact:** 726 Exchange St., Buffalo, NY 14210 • tg@bspcpa.com • 716-854-5034
- **Joined firm:** 1978
- **College:** B.S., Indiana University of Pennsylvania
- **Professional designations:** CPA, CFE, CFP
- **Born in:** Bradford, Pa.

- **Lives in:** Orchard Park
- **Spouse:** Cindy
- **Children:** Mike, Brian, Jessica
- **Favorite nonprofits:** Ronald McDonald House, Presbyterian Senior Care of WNY, Erie Cattaraugus Rail Trail Inc.
- **Self-description:** Reliable



DENISE GUELI

Team leader, commercial and small-business teams, Bonadio & Co. LLP

- **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • dgueli@bonadio.com • 716-580-1562
- **Joined firm:** 2002
- **College:** SUNY Geneseo
- **Professional designations:** CPA
- **Born in:** Deer Park
- **Lives in:** Williamsville
- **Spouse:** Chris
- **Children:** Kayla, Julia
- **Favorite nonprofits:** Consumer Credit Counseling Service of Buffalo, Danceability, Family Justice Center
- **Self-description:** Positive

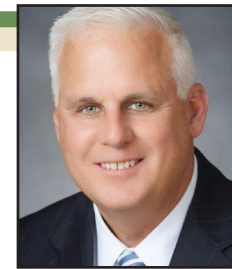


PETER HAFNER

President, Hafner Financial Group

- **Contact:** 2813 Wehrle Drive, Williamsville, NY 14221 • info@hafnerfinancialgroup.com • 716-650-4151
- **Joined firm:** 2007
- **College:** B.A., University at Buffalo
- **Professional designations:** CFP, CWS
- **Born in:** Buffalo
- **Lives in:** Depew
- **Spouse:** Kari Fiutak
- **Children:** Sydney, Cassie
- **Favorite nonprofits:** Dog Tags of WNY, SABAH, Kids Escaping Drugs
- **Self-description:**

Kaizen



JEFFREY HAHN

Partner, S.C. Parker & Co. Inc.

- **Contact:** 5892 Main St., Williamsville, NY 14221 • jhahn@scparker.com • 716-632-6800
- **Joined firm:** 2013
- **College:** Alfred University
- **Professional designations:** CFP
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Jill
- **Children:** Alyssia, Andrew, Alexander
- **Favorite nonprofits:** Buffalo Zoo, Boy Scouts
- **Self-description:** Dedicated



TARA HANDFORTH

Regional vice president, Wells Fargo

- **Contact:** 6400 Sheridan Drive, Williamsville, NY 14221 • tara.handforth@wellsfargo.com • 716-630-4102
- **Joined firm:** 2010
- **College:** B.S., Boston College; MBA, Villanova School of Business
- **Born in:** Bryn Mawr, Pa.
- **Lives in:** Clarence
- **Spouse:** Kevin
- **Children:** Lauren, Ryan, Erin



THOMAS HANLON

Chief operating officer/ executive vice president, Courier Capital LLC

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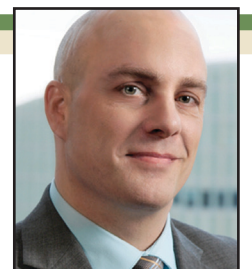
- **Joined firm:** 2005
- **College:** B.S., Canisius College; MBA, University at Buffalo
- **Professional designations:** CFA, CFP, CEBS
- **Born in:** Buffalo
- **Lives in:** West Seneca
- **Spouse:** Lisa
- **Children:** Ryan, Tara, Faith



BARBARA HAUSER

Owner, Barbara A. Hauser CPA

- **Contact:** 4535 Southwestern Blvd., Hamburg, NY 14075 • bahouser@hauser CPA.com • 716-649-8605
- **Joined firm:** 2016
- **College:** B.S., SUNY Buffalo State; MBA, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Favorite nonprofits:** St. Jude Children's Research Hospital, Wounded Warrior, Make-a-Wish Foundation
- **Self-description:** Principled



MICHAEL HEBURN

Chief operating officer/partner, Level Financial Advisors

- **Contact:** 1412 Sweet Home Road, Amherst, NY 14228 • mheburn@levelfa.com • 716-930-3585
- **Joined firm:** 2014
- **College:** B.A., SUNY Potsdam
- **Born in:** New Hartford
- **Lives in:** Lockport
- **Spouse:** Kim
- **Children:** Madison, Jordan
- **Favorite nonprofits:** Catholic Charities, Ride for Roswell, United Way
- **Self-description:** Hard-working

FOCUS: WHO'S WHO IN BANKING & FINANCE



JOANNE HERNANDEZ

Senior private client adviser, Wilmington Trust

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- **Joined firm:** 1988
- **College:** B.S. and MBA, University at Buffalo
- **Professional designations:** Series 7, 6 and 63; NYS life, accident and health insurance licenses
- **Born in:** Buffalo
- **Lives in:** Clarence Center
- **Spouse:** Raul
- **Children:** Zoe, Max
- **Favorite nonprofits:** Boys & Girls Clubs of Buffalo, Wheels With Wings, WNY Ovarian Cancer Project



RICHARD HILLIKER

President, S.C. Parker & Co. Inc.

- **Contact:** 5892 Main St., Williamsville, NY 14221 • richardhilliker@scparker.com
- **Joined firm:** 1968
- **College:** B.S., Syracuse University
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Joan
- **Children:** Karilea, Darla, Christina, Nancy, Richard Jr.
- **Favorite nonprofits:** Epilepsy Association, American Cancer Society, Heritage Ministries/Vinecroft



NEIL HOSTY

Executive vice president, retail and business banking, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 2002
- **College:** University of Ireland, Galway
- **Lives in:** Buffalo



PETER HUNT

Chairman/CEO, Hunt Real Estate Corp./ Hunt Mortgage Corp.

- **Contact:** 5400 Broadway, Lancaster, NY 14086 • peter.hunt@huntrealestate.com • 716-818-2563
- **Joined firm:** 1975
- **College:** B.S., St. Lawrence University
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Spouse:** Mary Jo
- **Children:** Emily, Charles, Leigh, Christina
- **Favorite nonprofits:** YMCA Buffalo Niagara, Albright-Knox Art Gallery, Say Yes Buffalo
- **Self-description:** Curious



DAVID JACOBS

Principal, The Jacobs Team/TJT Consulting

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- **Joined firm:** 1990
- **College:** B.S., Canisius College
- **Professional designations:** LUTCF
- **Born in:** Peoria, Ill.
- **Lives in:** Hamburg
- **Spouse:** Laurieann
- **Children:** Benjamin, Mallory
- **Favorite nonprofits:** Young Life, Hamburg Alumni Foundation, Wesleyan Church of Hamburg
- **Self-description:** Loyal



MARK JANULEWICZ

Partner, Lumsden & McCormick LLP

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- **Joined firm:** 1992
- **College:** B.S., accounting, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Orchard Park
- **Spouse:** Deanna
- **Children:** Erin, Jake
- **Favorite nonprofits:** Aspire of WNY, Kevin Guest House, St. John Vianney Church
- **Self-description:** Stoic



RENÉ JONES

Vice chairman, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 1992
- **College:** Boston College; Simon School of Business, University of Rochester
- **Lives in:** Buffalo



JAMES KEEFE

Partner, The Bonadio Group

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- **Joined firm:** 2005
- **College:** B.B.A., Niagara University
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** East Amherst
- **Spouse:** Gerry
- **Children:** Jim, Joe, Jeff, Jenna, Jason

- **Favorite nonprofits:** United Way of Buffalo & Erie County, Children's Hospital Foundation, Buffalo Museum of Science
- **Self-description:** Resourceful



EUGENE KERSHNER

Partner, Chiampou Travis Besaw & Kershner LLP

- **Contact:** 45 Bryant Woods N., Amherst, NY 14228 • gkershner@ctbk.com • 716-630-2400
- **Joined firm:** 1994
- **College:** B.S., Elmira College
- **Professional designations:** CPA
- **Born in:** Reading, Pa.
- **Lives in:** East Amherst
- **Spouse:** Shaena
- **Children:** Emily, Evan, Anthony, Domenic, Natalie, Brennan, Annalise
- **Favorite nonprofits:** Buffalo Renaissance Foundation, Amherst Police Foundation, Thoroughbred Aftercare Alliance
- **Self-description:** Focused



CHRISTOPHER KICINSKI

Partner, Sandhill Investment Management

- **Contact:** 360 Delaware Ave., Buffalo, NY 14202 • ckicinski@sandhill-im.com • 716-852-0279
- **Joined firm:** 2011
- **College:** B.S., University at Buffalo
- **Professional designations:** CPA, CFP
- **Born in:** Williamsville
- **Lives in:** Clarence Center
- **Spouse:** Laura
- **Children:** Carter, Owen, Hudson, Sawyer
- **Favorite nonprofits:** Roswell Park Cancer Institute, Town of Clarence Baseball Association, St. Gregory the Great School
- **Self-description:** Thankful



DARREN KING

Executive vice president/ chief financial officer, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 2000
- **College:** Richard Ivey School of Business, University of Western Ontario
- **Lives in:** Buffalo



LISA KIRISITS

Managing partner, Kirisits & Associates CPAS PLLC

- **Contact:** 1231 Delaware Ave., Buffalo, NY 14209 • lisak@kirisitscpa.com • 716-881-0089
- **Joined firm:** 1997
- **College:** B.S./MBA, University at Buffalo
- **Professional designations:** CPA, CGMA
- **Born in:** Cleveland
- **Lives in:** Lancaster
- **Spouse:** Fred
- **Favorite nonprofits:** Trocaire College, Deaf Access Services Inc., Buffalo Center for Arts and Technology Inc.
- **Self-description:** Collaborative



ROBERT KLOSS

Certified financial planner, ClearPlan Financial Inc.

- **Contact:** 6470 New Taylor Road, Orchard Park, NY 14127 • rkloss@clearplanfinancial.com • 716-312-7424
- **Joined firm:** 2007
- **College:** University of Miami
- **Professional designations:** J.D., CFP
- **Born in:** Binghamton
- **Lives in:** Orchard Park
- **Favorite nonprofits:**

- Shriners International, American Center for Law and Justice, Relay for Life, American Cancer Society
- **Self-description:** Diverse



KEVIN KLOTZBACH

Executive vice president, CFO and treasurer, Financial Institutions, Inc. and Five Star Bank

- **Contact:** 220 Liberty St., Warsaw, NY 14569 • kbklotzbach@five-starbank.com • 585-786-1130
- **Joined firm:** 2001
- **College:** B.A., SUNY Buffalo State
- **Born in:** Batavia
- **Lives in:** Elma
- **Spouse:** Luanne
- **Children:** Jillian, Brittany
- **Favorite nonprofits:** D'Youville College, Food Bank of WNY, Theodore Roosevelt Inaugural Site
- **Self-description:** Dedicated



RICHARD KOELBL

President, chairman and CEO, Alden State Bank

- **Contact:** PO Box 238, Alden, NY 14004 • rkoelbl@aldenstate.com • 716-937-3381
- **Joined firm:** 1973
- **College:** B.A., Hamilton College
- **Born in:** Buffalo
- **Lives in:** Alden
- **Spouse:** Lynelle
- **Children:** Katherine, Matthew, Elise, Edward



BRIAN LAIBLE

Managing partner, Landmark Wealth

FOCUS: WHO'S WHO IN BANKING & FINANCE

Management

► **Contact:** 45 Bryant Woods North, Amherst, NY 14228 • brian@landmarkfirm.com • 716-630-2417

► **Joined firm:** 2011
► **College:** B.S., Canisius College; MBA, University of Notre Dame

► **Professional designations:** CPA, CFP, CIMA, AIF, PFS

► **Born in:** Buffalo

► **Lives in:** Amherst

► **Spouse:** Jennifer

► **Children:** Grace, Jack, Jane

► **Favorite nonprofits:** Catholic Church, Make-a-Wish Foundation, Buffalo Zoo

► **Self-description:** Blessed

**THOMAS LILLIS**

Senior vice president and global commercial banking senior relationship manager, Bank of America Merrill Lynch

► **Contact:** 10 Fountain Plaza, Buffalo, NY 14202 • thomas.c.lillis@baml.com • 716-847-7327

► **Joined firm:** 2007

► **College:** B.S., Canisius College

► **Lives in:** Tonawanda

► **Spouse:** Karen

► **Children:** Jennifer, Mark, Casey

► **Favorite nonprofits:** Leukemia & Lymphoma Society, Catholic Charities

► **Self-description:** Enterprising

**THOMAS LIOLOS**

Branch manager, Paragon Home Loans Inc.

► **Contact:** 1780 Wehrle Dr., Williamsville, NY 14221 • tliolos@paragonhomeloans.com • 716-932-7896

► **Joined firm:** 1992

► **College:** B.S., University at Buffalo

► **Born in:** Williamsville

► **Lives in:** Clarence

► **Spouse:** Suzanne

► **Children:** Macy, Taylor

► **Favorite nonprofits:** Food Bank of WNY, Goodwill, Amvets

► **Self-description:** Dedicated

**RON LOJACONO**

Partner, WNY Asset Management LLC

► **Contact:** 6500 Sheridan Drive, Williamsville, NY 14051 • rlojacono@wnyasset.com • 716-626-0060

► **Joined firm:** 2005

► **College:** B.S., Medaille College

► **Professional designations:** CFP

► **Born in:** Buffalo

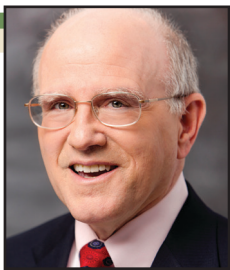
► **Lives in:** East Amherst

► **Spouse:** Sarah

► **Children:** Jessica, Laura, Joe

► **Favorite nonprofits:** Buffalo City Mission, Women & Children's Hospital, Joyful Rescues

► **Self-description:** Conscientious

**STEPHEN LOVULLO**

Partner, Lumsden & McCormick LLP

► **Contact:** 369 Franklin St., Buffalo, NY 14202 • slovullo@lumsdenccpa.com • 716-856-3300

► **Joined firm:** 1974

► **College:** B.S., accounting, Canisius College

► **Professional designations:** CPA

► **Born in:** Buffalo

► **Lives in:** Amherst

► **Children:** Thomas, Michael, Lauren, Vicky, Stephen

► **Favorite nonprofits:** Cradle Beach, Canisius College, St. Joseph's Collegiate Institute

► **Self-description:** Social

**LINDA MALLIA**

President, Hunt Mortgage

► **Contact:** 5400 Broadway, Lancaster, NY 14086 • linda.mallia@huntmortgage.com • 716-633-3700

► **Joined firm:** 1979

► **College:** Villa Maria College

► **Born in:** Buffalo

► **Lives in:** Lancaster

► **Spouse:** John Jr.

► **Children:** John, Jane

► **Favorite nonprofits:** National Alliance on Mental Illness

**SALVATORE MARRANCA**

Board chairman, Cattaraugus County Bank

► **Contact:** 120 Main St., Little Valley, NY 14755 • smarranca@ccblv.com • 716-938-9128

► **Joined firm:** 1982

► **College:** B.A., Bethany College

► **Born in:** Buffalo

► **Lives in:** Chautauqua

► **Spouse:** Kathryn

► **Children:** Mindy Lynn Marranca Glynn, Sara Kay Marranca Duffy

► **Favorite nonprofits:** Naples Military Museum, Almost Home Animal Sanctuary, Wounded Warrior Project

► **Self-description:** Passionate

**ROBERT MCARDLE**

Executive director/market executive, Chase Bank USA

► **Contact:** 2300 Main Place Tower, Buffalo, NY 14202 • robert.j.mcardle@chase.com • 716-858-1418

► **Joined firm:** Worked here 1991-2006; returned in 2015
► **College:** B.A., St. Bonaventure University; MBA, Canisius College

► **Professional designations:** Series 79, 63, 24

► **Born in:** Kenmore

► **Lives in:** Orchard Park

► **Children:** Zachary, Collin, Anna, Nolan

► **Favorite nonprofits:** Wesleyan Church of Hamburg, Compeer, Bison Fund

► **Self-description:** Blessed

**GEOFFREY MCDERMID**

President/CEO, McDermid Financial Group

► **Contact:** Cathedral Park Tower, Buffalo, NY 14202 • gmmcdermid@financialguide.com • 716-843-3100

► **Joined firm:** 1996

► **College:** Southern New Hampshire University

► **Professional designations:** CLTC, LUTCF

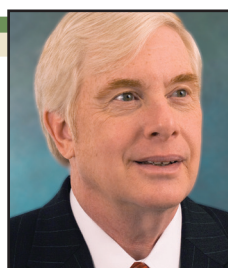
► **Born in:** Niagara Falls

► **Spouse:** Serena

► **Children:** Matthew, Candace

► **Favorite nonprofits:** Michael J. McDermid Exemplary Citizenship Fund, Empire State Ride, Boy Scouts of America

► **Self-description:** Dedicated

**LAWRENCE MCGOWAN**

President, Arbor Capital Management Corp.

► **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • ltmcgowan@arborcapitalmgt.com • 716-446-9111

► **Joined firm:** 1995

► **College:** B.S. and MBA, Canisius College

► **Born in:** Buffalo

► **Lives in:** Williamsville

► **Spouse:** Marian

► **Favorite nonprofits:** St. Mary's School for the Deaf, Community Music School, Girl Scouts of WNY

**JOHN MCKENNA**

President and CEO, Tompkins Bank of Castile

► **Contact:** 90 Main St, Batavia, NY 14020 • jmckenna@tompkinsfinancial.com • 585-345-6164

► **Joined firm:** 2009

► **College:** B.S., University of Rochester; MBA, Simon Business School

► **Born in:** Rochester

► **Lives in:** Pittsford

► **Spouse:** Mary Martha

► **Children:** Claire, Maggie, Liam, Owen

► **Favorite nonprofits:** Al Sigl Community of Agencies, Center for Governmental Research, Medical Motor Service of Rochester

► **Self-description:** Determined

**DAVID MCKINLEY**

Vice president of commercial banking, Community Bank N.A.

► **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • david.mckinley@communitybankna.com • 716-630-1594

► **Joined firm:** 2010

► **College:** Hartwick College

► **Professional designations:** CPA

► **Born in:** Albany

► **Lives in:** East Amherst

► **Spouse:** Susann

► **Children:** daughter and son

**TIMOTHY MCPOLAND**

Managing director/chairman, Freed Maxick CPAs P.C.

► **Contact:** 424 Main St., Buffalo, NY 14202 • tim.mcpoland@freedmaxick.com • 716-847-2651

► **Joined firm:** 1985

► **College:** B.S., Alfred University

► **Professional designations:** CPA/ABV, CFE, CVA

► **Born in:** Buffalo

► **Lives in:** Orchard Park

► **Spouse:** Jackie

► **Children:** Ryan, Corey, Kylie

► **Favorite nonprofits:** Aspire of WNY, Northeast Kidney Foundation, Susan G. Komen of WNY

► **Self-description:** Dedicated

**JAY MCWATTERS**

Partner/chairman, Dopkins Assurance Services Group, Dopkins & Company LLP

► **Contact:** 200 International Drive, Buffalo, NY 14221 • jmcwatters@dopkins.com • 716-634-8800

► **Joined firm:** 2003

► **College:** B.S., St. Bonaventure University; MBA, University of Scranton

► **Professional designations:** CPA

► **Born in:** Passaic, N.J.

► **Lives in:** Hamburg

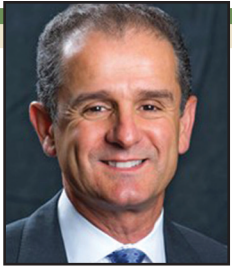
► **Spouse:** Mary

► **Children:** Leanne, Kate, Allison

► **Favorite nonprofits:** Aspire of WNY, Catholic Health System, United Way of Buffalo & Erie County

► **Self-description:** Curious

FOCUS: WHO'S WHO IN BANKING & FINANCE



JOHN MOSHIDES

President, Moshides Financial Group Inc.

- **Contact:** 65 Bryant Woods South, Amherst, NY 14228 • john@moshidesfinancial.com • 716-636-2525
- **Joined firm:** 1982
- **College:** B.S., University at Buffalo
- **Professional designations:** CLU, ChFC, AEP, CLTC
- **Born in:** Niagara Falls
- **Lives in:** East Amherst
- **Spouse:** Suzanne
- **Children:** Dana, Lindsay
- **Favorite nonprofits:** St. Luke's Mission of Mercy, The Buffalo News Neediest Fund, Hearts for the Homeless
- **Self-description:** Experienced



STEPHEN MULÉ

Senior vice president, chief retail officer, Bank of Akron

- **Contact:** 46 Main St., Akron, NY 14001 • smule@bankofakron.com • 716-442-6165
- **Joined firm:** 2012
- **College:** SUNY Buffalo State
- **Born in:** Buffalo
- **Lives in:** East Amherst
- **Spouse:** Christina
- **Children:** Ethan, Ryder
- **Favorite nonprofits:** Music is Art, Food Bank of WNY, Hearts and Hands



PETER MUNICH

Private client adviser, Wilmington Trust

- **Contact:** One Fountain Plaza, Buffalo, NY 14203 • pmunich@wilmingtontrust.com • 716-848-3810

- **Joined firm:** 1999
- **College:** B.S., Rochester Institute of Technology; MBA, Canisius College
- **Professional designations:** CFP
- **Born in:** Lackawanna
- **Lives in:** Buffalo
- **Children:** Stephan, Zachary
- **Favorite nonprofits:** Buffalo City Mission, Food Bank of WNY, Burchfield Penney Art Center



KEVIN MURPHY

Market president, Bank of America

- **Contact:** 10 Fountain Plaza, Buffalo, NY 14202 • kevin.p.murphy@baml.com • 716-847-7388
- **Joined firm:** 1984
- **College:** B.A., Dathmouth University; MBA, New York University
- **Born in:** New York City
- **Lives in:** Orchard Park
- **Spouse:** Pamela
- **Children:** Daniel, Michelle, Christopher
- **Favorite nonprofits:** Habitat for Humanity, Hospice, Meals on Wheels
- **Self-description:** High-energy



TODD MURPHY

Private client investment adviser, Wilmington Trust

- **Contact:** One Fountain Plaza, Buffalo, NY 14203 • tmurphy1@wilmingtontrust.com • 716-842-5222
- **Joined firm:** 1998
- **College:** Canisius College
- **Professional designations:** CFA, CAIA, CFP
- **Born in:** Buffalo
- **Lives in:** Orchard Park
- **Spouse:** Melissa
- **Children:** Elise, Eamon



DAVID NASCA

President/CEO, Evans Bank and Evans Bancorp

- **Contact:** One Grimsby Drive, Hamburg, NY 14075 • dnasca@evansbank.com • 716-926-2000
- **Joined firm:** 2006
- **College:** B.S., Canisius College; MBA, University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Mary Beth
- **Children:** David, Bradley, Arianna
- **Favorite nonprofits:** Catholic Charities, Brothers of Mercy, Olmsted Center for Sight
- **Self-description:** Energetic



DENISE NEAMON

Partner, Bonadio & Co LLP

- **Contact:** 100 Riley St., East Aurora, NY 14052 • dneamon@bonadio.com • 716-250-7884
- **Joined firm:** 1995
- **College:** Medaille College
- **Professional designations:** CPA
- **Born in:** Warsaw
- **Lives in:** East Aurora
- **Spouse:** David
- **Children:** Alexis, Tristan
- **Favorite nonprofits:** SPCA, Meals on Wheels, United Way of Buffalo & Erie County
- **Self-description:** Dynamic



MICHÉ NEEDHAM

Partner, Lumsden & McCormick, LLP

- **Contact:** 369 Franklin St., Buffalo, NY 14202 • mneedham@

- **Joined firm:** 2003
- **College:** B.S. accounting, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Tonawanda
- **Spouse:** Matthew
- **Children:** Issac, Emily
- **Favorite nonprofits:** Buffalo & Erie County Botanical Gardens, Buffalo Zoo, Theatre of Youth
- **Self-description:** Focused



MICHAEL NOWICKI

Senior vice president/commercial banking market executive, Bank of America Merrill Lynch

- **Contact:** 10 Fountain Plaza, Buffalo, NY 14202 • michael.r.nowicki@baml.com • 716-847-4256
- **Joined firm:** 2006
- **College:** B.S., Canisius College; MBA University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Hamburg
- **Spouse:** Susan
- **Children:** Alyssa, Christina
- **Favorite nonprofits:** Food Bank of WNY, Buffalo Society of Natural Sciences, Nardin Academy
- **Self-description:** Determined



TED OEXLE

Regional president, Five Star Bank

- **Contact:** 300 Spindrift Drive, Amherst, NY 14221 • tsoexle@five-starbank.com • 716-839-0428
- **Joined firm:** 2016
- **College:** SUNY Buffalo State
- **Born in:** Buffalo
- **Lives in:** Kenmore
- **Spouse:** Jennifer
- **Favorite nonprofits:** Hilbert College, United Way of Buffalo & Erie

- County, SPCA
- **Self-description:** Dependable



ANTHONY OGOREK

Founder/CEO, Ogorek Wealth Management LLC

- **Contact:** Sheridan Meadows Corporate Park North, Williamsville, NY 14221 • tony@ogorek.com • 716-626-5000
- **Joined firm:** 1987
- **College:** B.M., Rosary Hill College; B.S., Daemen College; Ed.D./M.A., University at Buffalo
- **Professional designations:** CFP
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Janice
- **Favorite nonprofits:** Doctors Without Borders, Gerard Place, Catholic Charities
- **Self-description:** Inquisitive



NICHOLLE OVERKAMP

CEO, Wilcox Financial Group, LLC

- **Contact:** 29 California Drive, Williamsville, NY 14221 • noverkamp@financialguide.com • 716-906-3175
- **Joined firm:** 2012
- **College:** B.A., Medaille College; MBA, University of Phoenix
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Christopher
- **Favorite nonprofits:** Prevention Focus, Carly's Club, ECMC Foundation
- **Self-description:** Authentic



KEITH PARWULSKI

Buffalo regional director, The Summit Federal Credit Union

- **Contact:** 100 Marina Drive, Rochester, NY 14626 • kparwulski@summitfcu.org • 716-512-7328
- **Joined firm:** 2013
- **College:** B.S., University at Buffalo
- **Professional designations:** CUDE
- **Born in:** Buffalo
- **Lives in:** Clarence Center
- **Children:** Stephanie, Stephen
- **Favorite nonprofits:** Food Bank of WNY, American Heart Association, Hospice Buffalo
- **Self-description:** Determined



JOHN PIERONI

Partner, WNY Asset Management, LLC

- **Contact:** 6500 Sheridan Drive, Williamsville, NY 14221 • jpieroni@wnyasset.com • 716-626-0060
- **Joined firm:** 2001
- **College:** B.A., University at Buffalo
- **Professional designations:** CFP
- **Born in:** Buffalo
- **Lives in:** Eggertsville
- **Spouse:** Maria
- **Children:** Jack, Luke, Will
- **Favorite nonprofits:** Buffalo City Mission, Community Foundation for Greater Buffalo, Let Them LOL
- **Self-description:** Compassionate

FOCUS: WHO'S WHO IN BANKING & FINANCE

**ROBERT POLLOCK**

Partner/chair, Dopkins Tax Advisory Group, Dopkins & Co. LLP

- ▶ **Contact:** 200 International Drive, Buffalo, NY 14221 • rpollock@dopkins.com • 716-634-8800
- ▶ **Joined firm:** 1988
- ▶ **College:** B.S., Canisius College; B.S., LeMoyné College
- ▶ **Professional designations:** CPA, CVA
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Katherine
- ▶ **Children:** Michael, Elizabeth, Gregory, Jeffrey
- ▶ **Favorite nonprofits:** The Bison Fund, Say Yes Buffalo, Catholic Charities
- ▶ **Self-description:** Enthusiastic

**THOMAS QUEALY**

CEO, Nottingham Advisors

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • tom.quealy@nottinghamadvisors.com • 716-633-3800
- ▶ **Joined firm:** 1989
- ▶ **College:** University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Renee
- ▶ **Children:** Patrick, Andrew
- ▶ **Favorite nonprofits:** Goodwill Industries, Buffalo Renaissance Foundation, Food Bank of WNY
- ▶ **Self-description:** Blessed

**KEVIN QUINN**

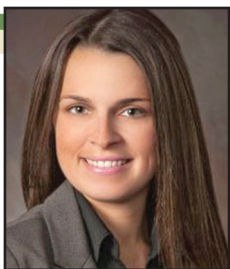
Head of corporate banking, Midwest and New England region, HSBC Bank USA NA

- ▶ **Contact:** 95 Washington St., Buffalo, NY 14273 • kevin.b.quinn@us.hsbc.com • 716-841-2556
- ▶ **Joined firm:** 2005
- ▶ **College:** B.A., University of Notre Dame
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Therese
- ▶ **Children:** Kate, Kevin, Emmet
- ▶ **Favorite nonprofits:** St. Mark Church/School, Nardin Academy, Canisius High School
- ▶ **Self-description:** Positive

**JAMES RAHILL**

Senior commercial banker, Community Bank N.A.

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • james.rahill@communitybankna.com • 716-262-0249
- ▶ **Joined firm:** 2015
- ▶ **College:** B.S., Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Patricia
- ▶ **Children:** Jim, David, Kate, Betsy
- ▶ **Favorite nonprofits:** Catholic Charities, United Way of Buffalo & Erie County
- ▶ **Self-description:** Motivated

**ANGELA REA**

Retirement team leader, Lawley Retirement Advisors LLC

- ▶ **Contact:** 361 Delaware Ave., Buffalo, NY

14202 • area@lawleyretirement.com • 716-849-1567

- ▶ **Joined firm:** 2016
- ▶ **College:** B.S., SUNY Geneseo
- ▶ **Professional designations:** AIF
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Michael
- ▶ **Favorite nonprofits:** SPCA, Roswell Park Alliance Foundation, Crohn's & Colitis Foundation
- ▶ **Self-description:** Motivated

**JAMES REHAK JR.**

Managing director, Lawley Retirement Advisors LLC

- ▶ **Contact:** 361 Delaware Ave., Buffalo, NY 14202 • jrehak@lawleyretirement.com • 716-849-8219
- ▶ **Joined firm:** 2010
- ▶ **College:** B.S., SUNY Buffalo State
- ▶ **Professional designations:** AIF, ChFC, REBC, CLU
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Kelly
- ▶ **Children:** Meegan, J.P.
- ▶ **Favorite nonprofits:** United Way of Buffalo & Erie County, Heritage Centers, Roswell Park Alliance Foundation
- ▶ **Self-description:** Passionate

**DANIEL REINGA**

President/CEO, Lake Shore Savings Bank

- ▶ **Contact:** 31 E. Fourth St., Dunkirk, NY 14048 • daniel.reinga@lakeshoresavings.com • 716-366-4070, x1257
- ▶ **Joined firm:** 2010 as COO; 1994 as a board member
- ▶ **College:** B.S., Allegheny College; MBA, University of South Florida; G.D.B., ABA Stonier National Graduate School of Banking

- ▶ **Born in:** Dunkirk
- ▶ **Lives in:** Fredonia
- ▶ **Spouse:** Wendy
- ▶ **Children:** Elizabeth, Mark, Parker, Alex
- ▶ **Favorite nonprofits:** Mikey's Way Foundation, Buffalo Hearing and Speech Center, Fredonia College Foundation
- ▶ **Self-description:** Forward-thinking

**LOUIS RIVERA**

Financial consultant, S.C. Parker & Co. Inc.

- ▶ **Contact:** 5892 Main St., Williamsville, NY 14221 • lriviera@scparker.com • 716-632-6800
- ▶ **Joined firm:** 2015
- ▶ **College:** Old Dominion University
- ▶ **Born in:** Hartford
- ▶ **Lives in:** Kenmore
- ▶ **Spouse:** Stacey
- ▶ **Children:** Jacob, Laurel, Reilly
- ▶ **Favorite nonprofits:** Habitat for Humanity, Ducks Unlimited, National Academy of Finance
- ▶ **Self-description:** Approachable

**JOHN RUMSCHIK**

President, M&T Insurance Agency and M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 2000
- ▶ **College:** Niagara University
- ▶ **Lives in:** Buffalo

**PATRICK SALADYGA**

Retirement plan adviser, Lawley Retirement Advisors LLC

- ▶ **Contact:** 361 Delaware

Ave., Buffalo, NY 14202 • psaladyga@lawleyretirement.com • 716-849-4368

- ▶ **Joined firm:** 2017
- ▶ **College:** B.S., Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Fiancee:** Meg
- ▶ **Favorite nonprofits:** The Movember Foundation, Buddy's Second Chance Rescue, American Foundation for Suicide Prevention
- ▶ **Self-description:** Trustworthy

**MIMI SCHANZLIN**

Managing director, United Capital

- ▶ **Contact:** 374 Delaware Ave., Buffalo, NY 14202 • mimi.schanzlin@unitedcp.com • 716-332-1963
- ▶ **Joined firm:** 2012
- ▶ **College:** B.S., Boston College; MBA, University at Buffalo
- ▶ **Professional designations:** CFP
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Kenmore
- ▶ **Spouse:** John
- ▶ **Children:** Matthew, Jacqueline
- ▶ **Favorite nonprofits:** Roswell Park Cancer Institute, Hospice, Catholic Charities
- ▶ **Self-description:** Organized

**JOHN SCHIAVONE**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202 • jschiavone@lumsden.com • 716-856-3300
- ▶ **Joined firm:** 1989
- ▶ **College:** B.B.A., accounting, Duquesne University
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Potenza, Italy
- ▶ **Lives in:** Lockport
- ▶ **Spouse:** Patty

- ▶ **Children:** Kellie, John
- ▶ **Favorite nonprofits:** Catholic Charities, WNY Alzheimer's Association, ECC Foundation
- ▶ **Self-description:** Tenacious

**DAVID SCHLEIN**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202 • dschlein@lumsden.com • 716-856-3300
- ▶ **Joined firm:** 1980
- ▶ **College:** B.S., accounting, SUNY Buffalo State
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Rochester
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Roseanne
- ▶ **Children:** Samantha, Daniel
- ▶ **Favorite nonprofits:** Jewish Family Services, United Way of Buffalo & Erie County, Make-A-Wish Foundation
- ▶ **Self-description:** Approachable

**RICHARD SCHROEDER**

Chief investment officer, Level Financial Advisors

- ▶ **Contact:** 1412 Sweet Home Road, Amherst, NY 14228 • richard@levelfa.com • 716-634-6113
- ▶ **Joined firm:** 1999
- ▶ **College:** Binghamton University, University at Buffalo
- ▶ **Professional designations:** CFP
- ▶ **Born in:** Huntington
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Jane Burns
- ▶ **Children:** Amy, Adam, Abby
- ▶ **Favorite nonprofits:** Torn Space Theater, Just Buffalo Literary Center, Irish Classical Theater
- ▶ **Self-description:** Intellectual

FOCUS: WHO'S WHO IN BANKING & FINANCE



BUFORD SEARS

Regional president of commercial and private banking, KeyBank

- ▶ **Contact:** 726 Exchange St., Buffalo, NY 14224 • buford_sears@keybank.com • 716-819-5759
- ▶ **Joined firm:** 2010
- ▶ **College:** B.A., University of North Carolina, Chapel Hill; M.A., School of Advanced International Studies, Johns Hopkins University
- ▶ **Born in:** Charleston, W.Va.
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Suzy
- ▶ **Children:** Rosemary, Newton, Lucy
- ▶ **Favorite nonprofits:** Roswell Park Cancer Institute, Hospice Buffalo, Albright-Knox Art Gallery
- ▶ **Self-description:** Genuine



JAMES SEGARRA

Managing partner, Tronconi Segarra & Associates LLP

- ▶ **Contact:** 8321 Main St., Williamsville, NY 14221 • jsegarra@tsacpa.com • 716-633-1373
- ▶ **Joined firm:** 1995
- ▶ **College:** B.S., Canisius College
- ▶ **Professional designations:** CPA
- ▶ **Born in:** Niagara Falls
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Ann
- ▶ **Children:** Kailee, Justyn
- ▶ **Favorite nonprofits:** Nonprofits that aid children
- ▶ **Self-description:** Determined.



CHRISTOPHER SHAFER

Senior vice president/branch director, RBC Wealth Management

- ▶ **Contact:** 6225 Sheridan Drive, Williamsville, NY 14221 • christopher.shafer@rbc.com • 716-635-8406
- ▶ **Joined firm:** 2005
- ▶ **College:** B.S., Bowling Green State University
- ▶ **Born in:** Stamford
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Martha
- ▶ **Children:** Matthew, Adam, Lindsay, Jessica
- ▶ **Favorite nonprofits:** One in Six Foundation, Alzheimer's Foundation
- ▶ **Self-description:** Loyal



TRACY SHERWOOD

Senior financial adviser, Ogorek Wealth Management LLC

- ▶ **Contact:** Sheridan Meadows Corporate Park North, Williamsville, NY 14221 • tracy.sherwood@ogorek.com • 716-626-5000
- ▶ **Joined firm:** 1994
- ▶ **College:** B.S., SUNY Brockport
- ▶ **Professional designations:** CFP
- ▶ **Born in:** Lockport
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Todd
- ▶ **Children:** Trenton, Andrew
- ▶ **Favorite nonprofits:** United Way, Hospice, Make-A-Wish
- ▶ **Self-description:** Dedicated



JEFFREY SMITH

Vice president/resident director, Merrill Lynch

- ▶ **Contact:** 50 Fountain Plaza, Buffalo, NY 14202 • jeffrey.j.smith@ml.com
- ▶ **Certifications:** CFP, CRPC
- ▶ **Joined firm:** 2011
- ▶ **College:** B.A., SUNY Geneseo; M.S., St. John Fisher College
- ▶ **Born in:** Lockport
- ▶ **Lives in:** Penfield
- ▶ **Spouse:** Linda
- ▶ **Children:** Jack, Chase
- ▶ **Favorite nonprofits:** Daystar, Young Women's College Prep, Canisius High School



DOUGLAS SOSNOWSKI

Partner, Brisbane Consulting Group LLC

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202 • dsosnowski@brison.com • 716-856-3300
- ▶ **Joined firm:** 2005
- ▶ **College:** B.S. accounting, SUNY Buffalo State
- ▶ **Professional designations:** CPA/ABV, ASA, CFF
- ▶ **Born in:** Lewiston
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Kristi
- ▶ **Children:** Victoria, Kristina, Amanda, Julia
- ▶ **Favorite nonprofits:** Community Services for the Developmentally Disabled; Girl Scouts of WNY, St. Luke's Mission of Mercy
- ▶ **Self-description:** Vigilant



KEITH STOLZENBURG

Managing partner, Buffalo office, PricewaterhouseCoopers LLP

- ▶ **Contact:** 726 Exchange St., Buffalo, NY 14051 • keith.stolzenburg@pwc.com • 716-855-4323
- ▶ **Joined firm:** 1981
- ▶ **College:** University at Buffalo
- ▶ **Professional designations:** CPA

- ▶ **Born in:** North Tonawanda
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Rosanne
- ▶ **Children:** Anna, Eric
- ▶ **Favorite nonprofits:** Martin House Restoration Corp., United Way of Buffalo & Erie County, University at Buffalo Foundation
- ▶ **Self-description:** Affordable



ROCCO SURACE

Partner, The Bonadio Group

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- ▶ **Joined firm:** 1980
- ▶ **College:** B.B.A., accounting, Niagara University
- ▶ **Professional designations:** CPA, ABV, CVA, CFF, CGMA, JONAH
- ▶ **Born in:** Rochester
- ▶ **Lives in:** Lockport
- ▶ **Spouse:** Debbie
- ▶ **Children:** Christianna, AnnaLynn, Rocky
- ▶ **Favorite nonprofits:** Leukemia & Lymphoma Society of Western & Central New York, The Levesque Institute, St. Jude Children's Research Hospital
- ▶ **Self-description:** Thankful



BEVERLY SUTTON

Vice president of operations and enterprise risk management, Lake Shore Savings Bank

- ▶ **Contact:** 31 E. Fourth St., Dunkirk, NY 14048 • beverly.sutton@lakeshoresavings.com • 716-366-4070
- ▶ **Joined firm:** 1993
- ▶ **College:** B.A., SUNY Fredonia
- ▶ **Born in:** Dunkirk
- ▶ **Lives in:** Fredonia
- ▶ **Children:** Jordan, Mark, Mia
- ▶ **Favorite nonprofits:** American Cancer Society, Hospice, Mikey's Way



TODD TEVENS

Managing director, Lawley Retirement Advisors LLC

- ▶ **Contact:** 361 Delaware Ave., Buffalo, NY 14202 • ttevens@lawleyretirement.com • 716-849-4366
- ▶ **Joined firm:** 2011
- ▶ **College:** B.A., Mercyhurst College
- ▶ **Professional designations:** AIF
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Snyder
- ▶ **Spouse:** Andrea
- ▶ **Children:** Tyler, Tanner, Trevor
- ▶ **Favorite nonprofits:** St. Joseph's Collegiate Institute, Christ the King Seminary, Buffalo Goes Gray
- ▶ **Self-description:** Dynamic



MICHAEL TODARO

Executive vice president, mortgage and customer asset management, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 1995
- ▶ **College:** Colgate University, New York University's Stern School of Business
- ▶ **Lives in:** Buffalo



MICHELE TROLLI

Executive vice president/ chief information officer, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 2005
- ▶ **College:** John Carroll University
- ▶ **Lives in:** Buffalo



JAMES TYRPAK

President, Tyrpak Financial Associates

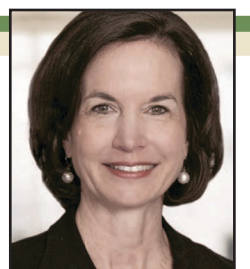
- ▶ **Contact:** 6622 Main St., Williamsville, NY 14221 • jim@tfafinancial.com • 716-631-1600
- ▶ **Joined firm:** 1988
- ▶ **College:** B.S., University at Buffalo; M.S., The American College
- ▶ **Professional designations:** MSFS, CLU, ChFC, AEP
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Donna
- ▶ **Children:** Michael, Jeff
- ▶ **Favorite nonprofits:** Buffalo Rotary Foundation, Society of FSP Foundation, Community Foundation for Greater Buffalo



MARIO URSO

Partner, The Bonadio Group

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- ▶ **Joined firm:** 1990
- ▶ **College:** B.S., SUNY Buffalo State
- ▶ **Professional designations:** CPA, FHFMA
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Linda
- ▶ **Children:** Jessica, Mario
- ▶ **Favorite nonprofits:** United Way of Buffalo & Erie County, BCAT, ROC the Future
- ▶ **Self-description:** Integrity



CYNTHIA VANCE

Manager, Jensen Marks

FOCUS: WHO'S WHO IN BANKING & FINANCE

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- **Joined firm:** 1997
- **College:** B.A., Michigan State University; MBA, Xavier University; J.D., University at Buffalo
- **Professional designations:** ChFC, CFP, AIF
- **Born in:** Buffalo
- **Lives in:** Amherst
- **Children:** Jack
- **Favorite nonprofits:** Center for Elder Law & Justice, WNED/WBFO, Canisius College
- **Self-description:** Kind



COURTLAND VAN DEUSEN

Partner, Lumsden & McCormick LLP

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- **Joined firm:** 2001
- **College:** B.B.A., accounting, Niagara University
- **Professional designations:** CPA
- **Born in:** Niagara Falls
- **Lives in:** Lancaster
- **Spouse:** Danielle
- **Children:** Allie, Amelia
- **Favorite nonprofits:** Niagara University, Boys & Girls Club, United Way of Buffalo & Erie County
- **Self-description:** Fun



NICHOLAS VERBANIC

Vice president/
portfolio manager,
Nottingham Advisors

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- **Joined firm:** 1990
- **College:** University at Buffalo

- **Professional designations:** CFP
- **Born in:** Buffalo
- **Lives in:** East Amherst
- **Spouse:** Laura
- **Children:** Greyson, Owen
- **Favorite nonprofits:** Salvation Army, American Red Cross, Kaely's Kindness Foundation
- **Self-description:** Dedicated



LISA WALSH

Senior vice president,
investments, The Walsh
Group of Raymond James

- **Contact:** 468 Delaware Ave., Buffalo, NY 14202 • lisa.walsh@raymondjames.com • 716-768-5481
- **Joined firm:** 2014
- **College:** University of Rochester
- **Born in:** Kenmore
- **Lives in:** Buffalo
- **Spouse:** Peter
- **Children:** Katie, P.J.
- **Favorite nonprofits:** Nardin Academy, Western New York Women's Fund, Roswell Park Cancer Institute
- **Self-description:** Growth



PETER WALSH

Senior vice president,
investments, The Walsh
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- **Joined firm:** 2014
- **College:** University of Maryland
- **Born in:** Syracuse
- **Lives in:** Buffalo
- **Spouse:** Lisa
- **Children:** Katie, P.J.
- **Favorite nonprofits:** Hospice, Roswell Park Cancer Institute, Nardin Academy
- **Self-description:** Up



D. SCOTT WARMAN

Executive vice president
and treasurer, M&T Bank

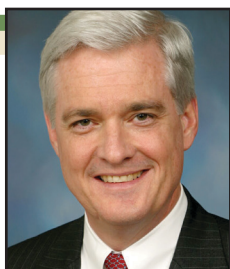
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- **Joined firm:** 1995
- **College:** Canisius College
- **Lives in:** Buffalo



JONATHAN WEIR

Managing partner, Weir
Financial Resources

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- **Joined firm:** 1994
- **College:** B.A., Boston University; J.D., University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Favorite nonprofits:** Food Bank of WNY, Roswell Park Cancer Institute, The Bison Fund
- **Self-description:** Grateful



JEFF WELLINGTON

Western New York regional
president, M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 2003
- **Lives in:** Buffalo



JEFFREY WERDEIN

Executive vice president
of commercial lending,

Lake Shore Savings Bank

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- **Joined firm:** 2014
- **College:** MBA, University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Orchard Park
- **Spouse:** Kelly
- **Children:** Ryan, Claire
- **Favorite nonprofits:** Meals on Wheels, Juvenile Diabetes Research Foundation, Cystic Fibrosis Foundation
- **Self-description:** Trusted



LAWRENCE WHISTLER

President/chief investment
officer, Nottingham Advisors

- **Contact:** 100 Corporate Parkway, Amherst, NY 14226 • larry.whistler@nottinghamadvisors.com • 716-633-3800
- **Joined firm:** 2006
- **College:** College of William & Mary; MBA, Emory University
- **Professional designations:** CFA
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Spouse:** Margaret
- **Children:** Owen, Zachary, Samuel
- **Favorite nonprofits:** Albright-Knox Art Gallery, Gateway-Longview Inc., Food Bank of WNY
- **Self-description:** Grateful



ROBERT WILMERS

Chairman and CEO,
M&T Bank

- **Contact:** One M&T Plaza, Buffalo, NY 14203
- **Joined firm:** 1983
- **College:** Harvard University
- **Lives in:** Buffalo



BRUCE ZGODA

CPA, Zgoda &
Associates CPAs PC

- **Contact:** 17 Limestone Drive, Williamsville, NY 14221 • bmz4848@aol.com • 716-759-8358
- **Joined firm:** 1975
- **College:** B.S., accounting, University at Buffalo
- **Professional designations:** CPA
- **Born in:** Buffalo
- **Lives in:** Clarence
- **Spouse:** Cathy
- **Children:** Todd, Scott, Jill
- **Favorite nonprofits:** Catholic Charities, Wings Flights of Hope, Dynamic Catholic
- **Self-description:** Passionate



MARK ZIEMBA II

Investment manager/
retirement plan consultant,
LPL Financial

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- **Joined firm:** 2011
- **College:** University at Buffalo
- **Professional designations:** AIF
- **Born in:** Buffalo
- **Lives in:** Hamburg
- **Spouse:** Nickolas Nenko
- **Favorite nonprofits:** WEDI, Alzheimer's Association, Roswell Park Cancer Institute
- **Self-description:** Thoughtful



THOMAS ZUGGER

Agent, MassMutual/
McDermid Financial Group

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- **Joined firm:** 1985
- **College:** St. Bonaventure University
- **Professional designations:** CLU, ChFC, CLTC
- **Born in:** Atlanta
- **Lives in:** Lake View
- **Spouse:** Colleen
- **Children:** Mollie, Kellie
- **Favorite nonprofits:** Michael J. McDermid Exemplary Citizenship Fund, Queen of Angels Church; Hamburg Soccer Club
- **Self-description:** Grateful