

FOCUS: WHO'S WHO IN BANKING & FINANCE

Financial leaders

Welcome to Who's Who in Banking and Financial Services 2018, a compilation of the men and women who run banks and financial institutions in Western New York. These CEOs, partners and executives appear in our database for The Lists. Participation was voluntary.



JONATHAN AMOIA
Partner/director, Sandhill Investment Management

- ▶ **Contact:** 360 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2014
- ▶ **College:** B.S., SUNY New Paltz; MBA, University of Rochester Simon Business School
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Rachel
- ▶ **Children:** Giana, Matteo, Adriana
- ▶ **Favorite nonprofits:** Bison Children's Scholarship Fund, Albright-Knox Art Gallery, Kenmore Mercy Foundation



BROOKE ANDERSON-TOMPKINS

- President, 1st Priority Mortgage Inc.*
- ▶ **Contact:** 6000 Sheridan Drive, Williamsville, NY 14221
 - ▶ **Joined firm:** 2007
 - ▶ **College:** Hilbert College, University at Buffalo Center for Entrepreneurial Leadership
 - ▶ **Born in:** Springville
 - ▶ **Lives on:** Grand Island
 - ▶ **Spouse:** David
 - ▶ **Favorite nonprofits:** Roswell Park Comprehensive Cancer Center, Habitat for Humanity, World Vision



MARTIN BIRMINGHAM

- President/CEO, Financial Institutions Inc. and Five Star Bank*
- ▶ **Contact:** 220 Liberty St., Warsaw, NY 14569
 - ▶ **Joined firm:** 2005
 - ▶ **College:** B.A., St. Lawrence University; MBA, University of Rochester Simon Business School
 - ▶ **Born in:** Rochester
 - ▶ **Lives in:** Pittsford
 - ▶ **Spouse:** Jill
 - ▶ **Children:** Annie, Tommy
 - ▶ **Favorite nonprofits:** United Way, St. John Fisher College, YMCA
 - ▶ **If I won the lottery I would:** buy a Tauck Tour for my family.



DANIEL BLAKE
President, Southtowns Financial Group Inc.

- ▶ **Contact:** 3438 Orchard Park Road, Orchard Park, NY 14127
- ▶ **Founded firm:** 1994
- ▶ **Professional designations:** MS, ChFC, CLU, CFP, RICP
- ▶ **College:** Canisius College, American College of Financial Services
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** Food Bank of WNY; One Jesuit Buffalo



ROBERT BOJDAK

- Executive vice president/chief credit officer, M&T Bank*
- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203



ROSANNE BRAXTON

- President, Level Financial Advisors*
- ▶ **Contact:** 1412 Sweet Home Road, Amherst, NY 14228
 - ▶ **Joined firm:** 1987
 - ▶ **Professional designation:** CFP
 - ▶ **College:** B.S., business, management and economics, Empire State College
 - ▶ **Born in:** Batavia
 - ▶ **Lives in:** Snyder
 - ▶ **Spouse:** James
 - ▶ **Children:** Amanda, Ashley, Michele, Ariel, Shannon
 - ▶ **Favorite nonprofits:** Boys & Girls Clubs of the Northtowns, Junior League of Buffalo, YMCA of Lancaster
 - ▶ **If I won the lottery I would:** set up a foundation to give back to the community.

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RAYMOND CARTER

Partner, Clearplan Financial Inc.

- ▶ **Contact:** 6470 New Taylor Road, Orchard Park, NY 14127
- ▶ **Joined firm:** 1991
- ▶ **Professional designation:** CFP
- ▶ **College:** B.S., Florida Southern College
- ▶ **Born in:** Kenmore
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Laura
- ▶ **Children:** Jennifer, Jessica, Julianne, Jaime
- ▶ **Favorite nonprofits:** Ride For Roswell, South Buffalo Community Table, Orchard Park Fire Co.
- ▶ **If I won the lottery I would:** share it with family and friends.



ROBERT CASTIGLIONE

Partner, WNY Asset Management

- ▶ **Contact:** 6500 Sheridan Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2004
- ▶ **Professional designation:** CFP
- ▶ **College:** B.S., Canisius College; MBA, Boston College
- ▶ **Born in:** Rochester
- ▶ **Lives in:** Wheatfield
- ▶ **Spouse:** Kim
- ▶ **Children:** Joseph, Nicholas
- ▶ **Favorite nonprofits:** Juvenile Diabetes Research Foundation, Buffalo City Mission, Centro Culturale Italiano di Buffalo
- ▶ **If I won the lottery I would:** go on a trip around the world with my family.



KATHERINE CHRISTOFERSON

CEO, McCollum Christoferson Group LLC

- ▶ **Contact:** 500 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 2012
- ▶ **College:** B.S., University of Minnesota
- ▶ **Born in:** Moose Lake, Minn.
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Owen
- ▶ **Children:** Todd, Tim, Molly
- ▶ **Favorite nonprofits:** Salvation Army, Food Bank of WNY, Mayo Clinic
- ▶ **If I won the lottery I would:** establish a charitable foundation.



JANET COLETTI

Executive vice president, human resources, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 1985
- ▶ **College:** B.A., Mount Holyoke College



MARK COLLARD

Managing partner, Landmark Wealth Management

- ▶ **Contact:** 45 Bryant Woods North, Amherst, NY, 14228
- ▶ **Joined firm:** 2005
- ▶ **Professional designation:** CPWA, CIS, CFS
- ▶ **College:** B.S., St. Vincent College; MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Jacqueline
- ▶ **Children:** Gavin, Grace,

Zach

- ▶ **Favorite nonprofits:** National Center for Missing & Exploited Children, The Buffalo Zoo, Buffalo Philharmonic Orchestra



SHAWN CONNOLLY

Partner, Jensen Marks Langer & Vance

- ▶ **Contact:** 360 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2011
- ▶ **Professional designation:** CFP
- ▶ **College:** B.S., SUNY Fredonia; MBA, St. Bonaventure University
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Hamburg
- ▶ **Spouse:** Amy
- ▶ **Children:** Patrick, Molly, Clare
- ▶ **Favorite nonprofits:** United Way of Buffalo & Erie County, ECMC Foundation, St. Francis High School
- ▶ **If I won the lottery I would:** build a disability-friendly park for youth.



LAURA COOLEY

Retirement plan adviser, Lawley

- ▶ **Contact:** 361 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2017
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** West Seneca
- ▶ **Spouse:** Ray
- ▶ **Children:** Katelyn, Claire, Nina
- ▶ **Favorite nonprofits:** The National Academy of Finance, Gerard Place, WNY Women's Foundation



MARY ANN COULSON

Senior vice president, branch manager, Morgan Stanley

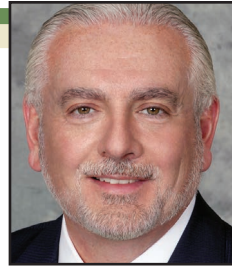
- ▶ **Contact:** 50 Fountain Plaza, Buffalo, NY 14202
- ▶ **Joined firm:** 1998
- ▶ **Professional designation:** CRPC, CDFA
- ▶ **College:** B.S., North Carolina State University
- ▶ **Born in:** Fort Campbell, Ky.
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** David
- ▶ **Children:** Adam
- ▶ **Favorite nonprofits:** Buffalo Prep, The Gow School, United Way
- ▶ **If I won the lottery I would:** give charitable gifts to the three favorite nonprofits listed.



JOSEPH CURATOLO

President, Georgetown Capital Group

- ▶ **Contact:** 5350 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 1987
- ▶ **Professional designation:** Series 7, 24, 65, 51
- ▶ **College:** University at Buffalo
- ▶ **Born in:** Bronx
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Kathleen
- ▶ **Favorite nonprofits:** Roswell Park Comprehensive Cancer Center, NativityMiguel Middle School, Kevin Guest House
- ▶ **If I won the lottery I would:** buy a NetJet membership.



JOHN D'ANGELO

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

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **College:** B.B.A., St. Bonaventure University



SARA DAYTON

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1998
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, SUNY Geneseo
- ▶ **Born in:** Paris
- ▶ **Lives in:** Cheektowaga
- ▶ **Spouse:** Andy
- ▶ **Stepchild:** Kayla
- ▶ **Favorite nonprofits:** SPCA Serving Erie County, South Line Fire Co. and Joyful Rescues
- ▶ **If I won the lottery I would:** aid an animal shelter.



SHERRY DELLEBOVI

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1985
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, University at Buffalo
- ▶ **Born in:** Rochester
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** UB Center for Entrepreneurial Leadership, The Moynihan Fund, Ride for Roswell
- ▶ **If I won the lottery I would:** buy a plane to travel the world with family and friends.



ADAM DESMOND

Regional market leader for Buffalo, Tompkins Bank of Castile

- ▶ **Contact:** 90 Main St., Batavia, NY 14020
- ▶ **Joined firm:** 2017
- ▶ **College:** B.S., finance, 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, Crohn's and Colitis Foundation
- ▶ **If I won the lottery I would:** buy a trip to Italy for the family.



TIMOTHY DICKEY

President/CEO, Bank of Holland

- ▶ **Contact:** 12 S. Main St., Holland, NY 14080
- ▶ **Joined firm:** 2011
- ▶ **College:** B.S., State University of New York at Fredonia
- ▶ **Born in:** Tonawanda
- ▶ **Lives in:** Tonawanda
- ▶ **Spouse:** Noelle
- ▶ **Favorite nonprofits:** Boys and Girls Club, Ride for Roswell, Buffalo Olmsted Parks Conservancy

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**SHELLEY DRAKE**

Western New York regional president/head of M&T Charitable Foundation, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **College:** University at Buffalo

**MICHAEL DRAVES**

Partner, KPMG

- ▶ **Contact:** 500 Seneca St., Buffalo, NY 14204
- ▶ **Joined firm:** 1996
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** First Book, Junior Achievement, Hospice
- ▶ **If I won the lottery I would:** buy a book for every child who doesn't have one.

**JAMES DUNN**

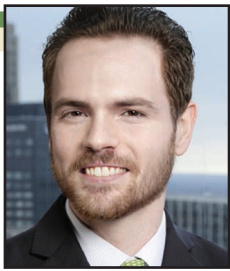
Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1987
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Tonawanda
- ▶ **Spouse:** Paula
- ▶ **If I won the lottery I would:** buy a second home in Aruba.

**JOHN EAGLETON**

President, Steuben Trust Co.

- ▶ **Contact:** One Steuben Square, Hornell, NY 14843
- ▶ **Joined firm:** 2017
- ▶ **College:** B.S., business, Canisius College; MBA, Duquesne University; Stonier School of Banking
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Tina
- ▶ **Children:** Tyler, Spencer
- ▶ **Favorite nonprofits:** Food Bank of WNY, Consumer Credit Counseling Services, St. James Hospital
- ▶ **If I won the lottery I would:** buy a condo in New York City.

**STEVEN ELWELL**

Partner/vice president, Level Financial Advisors

- ▶ **Contact:** 1412 Sweet Home Road, Amherst, NY 14228
- ▶ **Joined firm:** 2007
- ▶ **Professional designation:** CFP
- ▶ **College:** SUNY Alfred
- ▶ **Born in:** Hornell
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Breanna Pugh
- ▶ **Favorite nonprofits:** Ronald McDonald House of WNY, Lupus Alliance of Upstate NY, Say Yes Buffalo
- ▶ **If I won the lottery I would:** probably not buy anything substantial, maybe some new golf clubs.

**THOMAS EMMERLING**

CEO, Dopkins & Co. LLP

- ▶ **Contact:** 200 International Drive, Buffalo, NY 14221
- ▶ **Joined firm:** 1974
- ▶ **Professional designation:** CPA, CFP
- ▶ **College:** B.S., Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Carol
- ▶ **Children:** Patrick, Thomas
- ▶ **Favorite nonprofits:** Canisius College, St Bernadette Church, Sacred Heart League
- ▶ **If I won the lottery I would:** buy a certificate of deposit.

**MICHAEL EMSER**

Financial planner, Wealth.Future Inc.

- ▶ **Contact:** 2306 Wehrle Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 1987
- ▶ **Professional designation:** CFP
- ▶ **College:** State University of New York at Fredonia
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Cheektowaga
- ▶ **Children:** Eric, Michelle
- ▶ **Favorite nonprofits:** Food Bank of WNY, Summit Services for Autism, Eastern Hills Wesleyan Church
- ▶ **If I won the lottery I would:** give to charity.

**PATRICIA FARRELL**

Regional managing director, wealth advisory, Wilmington Trust

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203

- ▶ **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
- ▶ **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**

CFO, Lake Shore Bancorp Inc.

- ▶ **Contact:** 31 E. Fourth St., Dunkirk, NY 14048
- ▶ **Joined firm:** 1999
- ▶ **College:** B.S., Allegheny College; MBA, University at Buffalo
- ▶ **Lives in:** Fredonia
- ▶ **Spouse:** Timothy Murphy
- ▶ **Favorite nonprofits:** Mikey's Way Foundation, Northern Chautauqua Community Foundation, Dunkirk-Fredonia Meals on Wheels
- ▶ **If I won the lottery I would:** buy a house on Sanibel Island in Florida.

**THOMAS GILES**

Senior vice president, Citizens Bank N.A.

- ▶ **Contact:** 300 Airborne Parkway, Buffalo, NY 14225
- ▶ **Joined firm:** 2005
- ▶ **College:** Alfred University
- ▶ **Spouse:** Michelle
- ▶ **Children:** Alex, Jeremy, Kyle

**F. JAMES GINNANE**

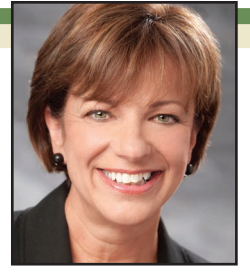
Managing member, Planned Futures Financial Group LLC

- ▶ **Contact:** 300 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 1997
- ▶ **Professional designation:** CLU, ChFC, CFP
- ▶ **College:** B.S., Niagara University
- ▶ **Born in:** Kenmore
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Judy
- ▶ **Children:** Amy, Christien, Tracy
- ▶ **Favorite nonprofits:** Niagara University, St. Gregory Church, Catholic Charities
- ▶ **If I won the lottery I would:** buy life insurance in the amount of the winnings.

**RICHARD GOLD**

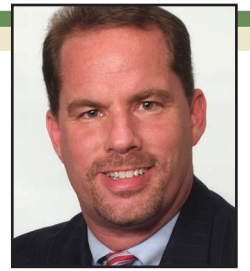
President and chief operating officer, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 1989
- ▶ **College:** B.S., Cornell University; MBA, New York University Stern School of Business.

**DONNA GONSER**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1982
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Robert
- ▶ **Children:** Ryan, Christopher, Nicholas
- ▶ **Favorite nonprofits:** Catholic Charities of Buffalo, United Way of Buffalo and Erie County, Parent Network of WNY
- ▶ **If I won the lottery I would:** buy a villa in Italy.

**PATRICK GORMAN**

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

- ▶ **Contact:** 5 Clark St., Orchard Park, NY 14127
- ▶ **Joined firm:** 2011
- ▶ **College:** B.S., University of Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Paula
- ▶ **Children:** Cassandra, Thomas, Patrick
- ▶ **Favorite nonprofits:** Hospice of Buffalo, Orchard Park Boys & Girls Club, Buffalo City Mission
- ▶ **If I won the lottery I would:** buy houses for my children.

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MARTIN GRIFFITH

President, Bank on Buffalo

- ▶ **Contact:** 535 Washington St., Buffalo, NY 14203
- ▶ **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:** St. Mary's School for the Deaf, New Directions Youth & Family Services, Food Bank of WNY
- ▶ **If I won the lottery I would:** buy a motor home to fill with friends and golf clubs.



MICHAEL GRIMALDI

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1990
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, Northern Ohio University
- ▶ **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



PETER GROGAN

Managing director, United Capital Financial Advisors

- ▶ **Contact:** 374 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2012

- ▶ **Professional designation:** CFP, CLU, AIFA, AEP
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Aurora
- ▶ **Spouse:** Christye Peterson
- ▶ **Children:** Peter, Katherine, Kathleen, Benjamin
- ▶ **Favorite nonprofits:** Cradle Beach Camp, United Way, Rural Outreach Center
- ▶ **If I won the lottery I would:** buy a NetJet membership.



THOMAS GROGAN

Managing partner, Brock Schechter & Polakoff LLP

- ▶ **Contact:** 726 Exchange St., Buffalo, NY 14210
- ▶ **Joined firm:** 1978
- ▶ **Professional designation:** CPA, CFE, CFP
- ▶ **College:** B.S., Indiana University of Pennsylvania
- ▶ **Born in:** Bradford, Pa.
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Cynthia
- ▶ **Children:** Michael, Brian, Jessica
- ▶ **Favorite nonprofits:** Ronald McDonald House Charities of WNY, Presbyterian Senior Care of WNY, Erie Cattaraugus Rail Trail



DENISE GUELI

Team leader, commercial and small-business teams, The Bonadio Group

- ▶ **Contact:** 100 Corporate Parkway, Amherst NY 14226
- ▶ **Joined firm:** 2002
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., SUNY Geneseo
- ▶ **Born in:** Deer Park
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Chris
- ▶ **Children:** Kayla, Julia
- ▶ **Favorite nonprofits:** Consumer Credit

Counseling of WNY, Danceability, Family Justice Center

- ▶ **If I won the lottery I would:** buy a first-class trip through Europe.



PETER HAFNER

President, Hafner Financial Group

- ▶ **Contact:** 5930 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 2007
- ▶ **Professional designation:** CFP, CWS
- ▶ **College:** B.A., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Kari Fiutak
- ▶ **Favorite nonprofits:** SOFA, SABAH
- ▶ **If I won the lottery I would:** buy a guided tour of Easter Island with Robert Schoch.



JEFFREY HAHN

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

- ▶ **Contact:** 5892 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 2013
- ▶ **Professional designation:** CFP
- ▶ **College:** Alfred University
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Jill
- ▶ **Children:** Alyssia, Andrew, Alexander
- ▶ **Favorite nonprofits:** Boy Scouts, Buffalo Zoo, City Mission
- ▶ **If I won the lottery I would:** use the money for various Investments.



RICHARD HAMISTER

New York regional president, Northwest Bank

- ▶ **Contact:** 375 Essjay Road, Williamsville, NY 14221
- ▶ **Joined firm:** 2018
- ▶ **College:** B.S., Thiel College; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Aurora
- ▶ **Fiancée:** Nickole Garrison
- ▶ **Children:** Kelly, Matthew
- ▶ **Favorite nonprofits:** Explore & More Children's Museum, Computers for Children, Theatre of Youth
- ▶ **If I won the lottery I would:** buy a Florida home on a golf course.



TARA HANDFORTH

Regional vice president, Wells Fargo

- ▶ **Contact:** 6400 Sheridan Drive, Williamsville, NY 14221
- ▶ **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
- ▶ **Favorite nonprofits:** Mikey's Way, United Way
- ▶ **If I won the lottery I would:** buy a beach house.



THOMAS HANLON

Chief operating officer/ executive vice president, Courier Capital LLC

- ▶ **Contact:** 1114 Delaware Ave., Buffalo, NY 14209
- ▶ **Joined firm:** 2005
- ▶ **Professional designation:** CFA, CFP, CEBS
- ▶ **College:** B.S., Canisius College; MBA, University of Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Spouse:** Lisa
- ▶ **Children:** Ryan, Tara, Faith



BARBARA HAUSER

Owner, Barbara A. Hauser CPA

- ▶ **Contact:** 4535 Southwestern Blvd., Hamburg, NY 14075
- ▶ **Joined firm:** 2016
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., SUNY Buffalo State; MBA University of Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** St. Jude Children's Research Hospital, Wounded Warriors, Make-A-Wish Foundation

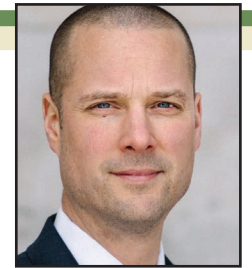


MICHAEL HEBURN

Chief operating officer, Level Financial Advisors

- ▶ **Contact:** 1412 Sweet Home Road, Amherst, NY 14228
- ▶ **Joined firm:** 2014
- ▶ **College:** SUNY Potsdam
- ▶ **Born in:** Utica
- ▶ **Lives in:** Lockport
- ▶ **Spouse:** Kim
- ▶ **Children:** Madison,

- Jordan
- ▶ **Favorite nonprofits:** Catholic Charities, Ride for Roswell
- ▶ **If I won the lottery I would:** buy a ranch with lots of acres and animals and also granite countertops for my wife.



ERIC HEPKINS

CEO, Cornerstone Community Federal Credit Union

- ▶ **Contact:** 6485 S. Transit Road, Lockport, NY 14095
- ▶ **Joined firm:** 2018
- ▶ **College:** SUNY Geneseo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Elizabeth
- ▶ **Children:** Elle, Ethan, Ewan
- ▶ **Favorite nonprofits:** United Way, WNY Americorps, Niagara Hospice



RICHARD HILLIKER

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

- ▶ **Contact:** 5892 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 1967
- ▶ **College:** B.S., Syracuse University
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Joan
- ▶ **Children:** Karilea, Darla, Christina, Nancy, Richard Jr.
- ▶ **Favorite nonprofits:** Heritage Ministries Epilepsy Association
- ▶ **If I won the lottery I would:** buy stocks and bonds.

FOCUS: WHO'S WHO IN BANKING & FINANCE

**JASON HOUSEMAN**

Senior vice president,
Citizens Financial Group

- ▶ **Contact:** 300 Airborne Parkway, Buffalo, NY 14225
- ▶ **Joined firm:** 2015
- ▶ **College:** B.A., University at Buffalo; MBA, University at Buffalo
- ▶ **Born in:** Lyndonville
- ▶ **Lives in:** Orchard Park
- ▶ **Spouse:** Jillian
- ▶ **Children:** Aurora, Aralyn
- ▶ **Favorite nonprofits:** Consumer Credit Counseling Services of Buffalo; Compeer Inc.; Food Bank of Western New York

**JAMES IGLEWSKI**

Market executive,
Key Private Bank

- ▶ **Contact:** 726 Exchange St., Buffalo, NY 14210
- ▶ **Joined firm:** 2017
- ▶ **College:** B.A., science in management, SUNY Buffalo State; MBA, Canisius College
- ▶ **Lives in:** Hamburg
- ▶ **Spouse:** Diana
- ▶ **Children:** Erin, Alyssa, Katie, Nick, Jenna
- ▶ **Favorite nonprofits:** Buffalo Renaissance Foundation, Gerard Place, Miracle League

**CHERYL JANKOWSKI**

Partner, Chiampou Travis
Besaw & Kershner LLP

- ▶ **Contact:** 45 Bryant Woods North, Amherst, NY 14228
- ▶ **Joined firm:** 2002
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., University at Buffalo

- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Hamburg
- ▶ **Spouse:** Thaddeus
- ▶ **Children:** Laura, Michael
- ▶ **Favorite nonprofits:** Harvest House, Community Foundation for Greater Buffalo, Roswell Park Comprehensive Cancer Center

- ▶ **If I won the lottery I would:** buy a home overlooking the lake.

**BRIAN JENSEN**

Financial adviser, Jensen
Marks Langer & Vance LLC

- ▶ **Contact:** 360 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 1980
- ▶ **Professional designation:** CLU, CHFC, CFP, AIF
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Detroit
- ▶ **Lives in:** Elmwood Village
- ▶ **Spouse:** Claire
- ▶ **Children:** Andrew, Alexander
- ▶ **Favorite nonprofits:** Food Bank of WNY, Roswell Park Alliance Foundation, Child & Family Services
- ▶ **If I won the lottery I would:** arrange a very nice experience or trip for the family (sons, siblings, moms and dads.)

**JILL JOHNSON**

Partner, Lumsden &
McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 2002
- ▶ **Professional designation:** CPA, CITP, CFE, FHFMA, CHFP
- ▶ **College:** B.S. and MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Cheektowaga
- ▶ **Spouse:** Andrew
- ▶ **Favorite nonprofits:** Buffalo Pug and Small Breed Rescue, Peace and Paws, Unyts
- ▶ **If I won the lottery I**

would: buy a house with a lot of land for our three dogs to run around.

**RENE JONES**

Chairman of the board/
CEO, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **College:** B.S., Boston College; MBA, University of Rochester Simon School of Business

**JAMES KEEFE**

Partner, The Bonadio Group

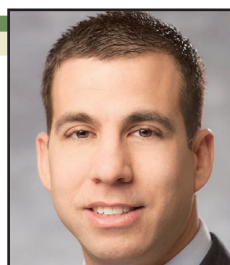
- ▶ **Contact:** 100 Corporate Parkway, Amherst NY 14226
- ▶ **Joined firm:** 2005
- ▶ **Professional designation:** CPA
- ▶ **College:** B.B.A., Niagara University
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Gerry
- ▶ **Children:** Jim, Joe, Jeff, Jenna, Jason
- ▶ **Favorite nonprofits:** John R. Oishei Children's Hospital, United Way, Shea's Performing Arts Center
- ▶ **If I won the lottery I would:** buy housing for the underprivileged.

**AUSTIN KELLY**

President of business
strategies, The BlackOak
Group LLC

- ▶ **Contact:** 350 Essjay Road, Williamsville, NY 14228
- ▶ **Joined firm:** 2009
- ▶ **Professional designation:** CFP, AIF, CPFA
- ▶ **College:** Northeastern University

- ▶ **Born in:** Phoenix.
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Jamie
- ▶ **Children:** Cameron, Leonardo, Benjamin
- ▶ **Favorite nonprofits:** Horizon, Make-A-Wish, SPCA
- ▶ **If I won the lottery I would:** buy lifetime Sabres tickets — it's just the beginning.

**BRIAN KERN**

Partner, Lumsden &
McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 2006
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, information systems, Canisius College
- ▶ **Born in:** Lockport
- ▶ **Lives in:** Elma
- ▶ **Spouse:** Katie
- ▶ **Favorite nonprofits:** Salvation Army, Roswell Park Comprehensive Cancer Center, Make-A-Wish Foundation
- ▶ **If I won the lottery I would:** buy a vacation home on a tropical island.

**DARREN KING**

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

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

**LISA KIRISITS**

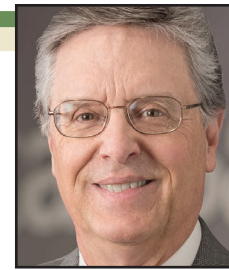
Managing partner, Kirisits
& Associates CPAS PLLC

- ▶ **Contact:** 1231 Delaware Ave., Buffalo, NY 14209
- ▶ **Joined firm:** 1997
- ▶ **Professional designation:** CPA, CGMA
- ▶ **College:** B.S., University at Buffalo; MBA, University at Buffalo
- ▶ **Born in:** Cleveland
- ▶ **Lives in:** Lancaster
- ▶ **Spouse:** Fred
- ▶ **Favorite nonprofits:** Trocaire College, Food for the Poor, Buffalo City Mission
- ▶ **If I won the lottery I would:** increase donations to charities.

**ROBERT KLOSS**

President, Clearplan
Financial Inc.

- ▶ **Contact:** 6470 New Taylor Road, Orchard Park, NY 14127
- ▶ **Joined firm:** 2007
- ▶ **Professional designation:** JD, CFP
- ▶ **College:** B.S., finance, University at Buffalo; J.D., University of Miami
- ▶ **Born in:** Binghamton
- ▶ **Lives in:** Orchard Park
- ▶ **Favorite nonprofits:** Shriners International, Relay for life, Life Extension Foundation
- ▶ **If I won the lottery I would:** buy a rare collection of guitars and fund music scholarships.

**KEVIN KLOTZBACH**

Executive vice president,
chief financial officer
and treasurer, Financial
Institutions Inc. and
Five Star Bank

- ▶ **Contact:** 220 Liberty St., Warsaw, NY 14569
- ▶ **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, Bison Children's Scholarship Fund
- ▶ **If I won the lottery I would:** buy a trip to the Amalfi Coast.

**HENRY KOZIOL**

Managing director/
chairman of the board,
Freed Maxick CPAs P.C.

- ▶ **Contact:** 424 Main St., Buffalo, NY 14202
- ▶ **Joined firm:** 1983
- ▶ **Professional designation:** CPA, CFP
- ▶ **College:** B.S., Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Elma
- ▶ **Spouse:** Anne
- ▶ **Children:** Kathryn
- ▶ **Favorite nonprofits:** Center for Hospice and Palliative Care, Buffalo City Mission, American Diabetes Association
- ▶ **If I won the lottery I would:** buy an Aston Martin.

FOCUS: WHO'S WHO IN BANKING & FINANCE



BRIAN LAIBLE

Managing partner, Landmark Wealth Management

- ▶ **Contact:** 45 Bryant Woods North, Amherst NY 14228
- ▶ **Joined firm:** 2011
- ▶ **Professional designation:** CPA, CFP, CIMA, MBA
- ▶ **College:** B.S., Canisius College; MBA, University of Notre Dame
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Jennifer
- ▶ **Children:** Grace, Jack, Jane
- ▶ **Favorite nonprofits:** Buffalo Zoo, Make-A-Wish Foundation, Catholic Charities
- ▶ **If I won the lottery I would:** take my kids out for ice cream.



THOMAS LILLIS

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

- ▶ **Contact:** 10 Fountain Plaza, Buffalo, NY 14202
- ▶ **Joined firm:** 2007
- ▶ **College:** Canisius College
- ▶ **Lives in:** Tonawanda
- ▶ **Spouse:** Karen
- ▶ **Favorite nonprofits:** Leukemia & Lymphoma Society, Catholic Charities



THOMAS LIOLOS

Branch manager, Paragon Home Loans Inc.

- ▶ **Contact:** 1780 Wehrle Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 1992
- ▶ **College:** B.A, University at Buffalo
- ▶ **Born in:** Williamsville
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Suzanne
- ▶ **Children:** Macy, Taylor
- ▶ **Favorite nonprofits:** Food Bank of WNY, Goodwill
- ▶ **If I won the lottery I would:** put it toward retirement.



JOHN LUGHINO

President/founder, Spectrum Wealth Management

- ▶ **Contact:** 4925 Main St., Amherst NY 14226
- ▶ **Joined firm:** 1993
- ▶ **Professional designation:** CPA, MBA, RFC
- ▶ **College:** B.A., Canisius College; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Spouse:** Julie
- ▶ **Children:** Paige,

Anthony

- ▶ **Favorite nonprofits:** St. Luke's Mission of Mercy, Buffalo City Mission, John R. Children's Hospital

- ▶ **If I won the lottery I would:** buy an all-inclusive vacation getaway for my extended family and 50 of my closest friends and co-workers.



TERESA MAJORS

Partner, Dopkins & Co. LLP

- ▶ **Contact:** 200 International Drive, Buffalo, NY 14221
- ▶ **Joined firm:** 2003
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., SUNY College at Oswego; MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Jim
- ▶ **Children:** Nolan
- ▶ **Favorite nonprofits:** St. Luke's Mission of Mercy, Food Bank of WNY, Catholic Charities
- ▶ **If I won the lottery I would:** first buy the blueprints for my dream vacation home.



MICHELLE MALONEY

Chief lending officer, Bank of Akron

- ▶ **Contact:** 46 Main St., Akron, NY 14001
- ▶ **Joined firm:** 2014
- ▶ **College:** A.S., Bryant & Stratton College and Erie Community College
- ▶ **Born in:** Greensburg, Pa.
- ▶ **Lives in:** Hamburg
- ▶ **Spouse:** Robert
- ▶ **Children:** Ryan, Sean, Tim, Maggie
- ▶ **Favorite nonprofits:** Music is Art, Unyts, Mercy Flight
- ▶ **If I won the lottery I would:** buy a vacation home on the ocean somewhere spectacular.



ROBERT MCARDLE

Executive director/market executive, JPMorgan Chase

- ▶ **Contact:** 2300 Main Place Tower, Buffalo, NY 14202
- ▶ **Joined firm:** 1991, left in 2006 and rejoined in 2015
- ▶ **College:** B.A., St. Bonaventure University; MBA, Canisius College
- ▶ **Born in:** Kenmore
- ▶ **Lives in:** Orchard Park
- ▶ **Children:** Zachary, Collin, Anna, Nolan
- ▶ **Favorite nonprofits:** Wesleyan Church of Hamburg, Compeer, Bison Children's Scholarship Fund
- ▶ **If I won the lottery I would:** buy Yankee season tickets.



GEOFFREY MCDERMID

CEO/president, McDermid Financial Group

- ▶ **Contact:** Cathedral Park Tower, Buffalo, NY 14202
- ▶ **Joined firm:** 1996
- ▶ **Professional designation:** CLTC, LUTCF
- ▶ **College:** B.S., Southern New Hampshire University
- ▶ **Born in:** Niagara Falls
- ▶ **Lives in:** Ransomville
- ▶ **Spouse:** Serena
- ▶ **Children:** Matthew, Candace
- ▶ **Favorite nonprofits:** M.J. McDermid Exemplary Citizenship Fund, Theodore Roosevelt Inaugural Historic Site, Mount St. Mary's Hospital Foundation
- ▶ **If I won the lottery I would:** buy a new vehicle for my mother-in-law.



LAWRENCE MCGOWAN

President, Arbor Capital Management

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 1995
- ▶ **College:** B.S., Canisius College; MBA, Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Marian
- ▶ **Children:** Melissa, Karen, Laura, Timothy
- ▶ **Favorite nonprofits:** St. Mary's School for the Deaf, Community Music School, Canisius College
- ▶ **If I won the lottery I would:** donate to my favorite charities.



JOHN MCKENNA

President/CEO, Tompkins Bank of Castile

- ▶ **Contact:** 90 Main St., Batavia, NY 14020
- ▶ **Joined firm:** 2009
- ▶ **College:** B.S., University of Rochester; MBA, William E. Simon School of Business Administration, University of Rochester
- ▶ **Born in:** Rochester
- ▶ **Lives in:** Pittsford
- ▶ **Spouse:** Mary Martha
- ▶ **Children:** Clare, Maggie, William, Owen
- ▶ **Favorite nonprofits:** Al Sigl Center, Center for Government Research, Catholic Diocese of Rochester
- ▶ **If I won the lottery I would:** take an extended vacation in Europe.



DAVID MCKINLEY

Vice president/commercial banking officer, Community Bank N.A.

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 2010
- ▶ **Professional designation:** CPA
- ▶ **College:** B.A., accounting, Hartwick College
- ▶ **Born in:** Albany
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Susann
- ▶ **Children:** Sydney, Kiefer
- ▶ **Favorite nonprofits:** Roswell Park Comprehensive Cancer Center, Amherst Paw Park, Grassroots Garden WNY
- ▶ **If I won the lottery I would:** buy World Cup tickets.



MICHAEL MCMAHON

Senior vice president/commercial banking team leader, KeyBank

- ▶ **Contact:** 726 Exchange St., Buffalo, NY 14210
- ▶ **Joined firm:** 2015
- ▶ **College:** B.A., University of Michigan
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Erin
- ▶ **Favorite nonprofits:** Compeer Inc., United Way of Buffalo and Erie County



JULIANNE LEPO

Founder, co-owner, Turning Tides Financial LLC

- ▶ **Contact:** 2821 Wehrle Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2013
- ▶ **Professional designation:** CDFA
- ▶ **College:** Medaille College
- ▶ **Born in:** Portland
- ▶ **Lives in:** Lockport
- ▶ **Children:** Ryan, Sean
- ▶ **Favorite nonprofits:** Dress for Success; Team Red, White & Blue; Share Our Strength
- ▶ **If I won the lottery I would:** make a large donation to the above charities.

FOCUS: WHO'S WHO IN BANKING & FINANCE

**JAY MCWATTERS**

Partner/chairman, Dopkins Assurance Services Group, Dopkins & Co. LLP

- ▶ **Contact:** 200 International Drive, Buffalo, NY 14221
- ▶ **Joined firm:** 2003
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., St. Bonaventure University; MBA, University of Scranton
- ▶ **Born in:** Passaic, N.J.
- ▶ **Lives in:** Hamburg
- ▶ **Spouse:** Mary
- ▶ **Children:** Leanne, Kate, Allison
- ▶ **Favorite nonprofits:** Catholic Health System, United Way of Buffalo and Erie County, YMCA
- ▶ **If I won the lottery I would:** buy the New York Yankees.

**JOHN MOSHIDES**

President, Moshides Financial Group

- ▶ **Contact:** 65 Bryant Woods South, Amherst, NY 14228
- ▶ **Joined firm:** 1987
- ▶ **Professional designation:** CLU, ChFC, AEP, CLTC
- ▶ **College:** B.S., business management, University at Buffalo
- ▶ **Born in:** Niagara Falls
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Suzanne
- ▶ **Children:** Dana, Lindsay
- ▶ **Favorite nonprofits:** St. Luke's Mission of Mercy, Hearts for the Homeless, Buffalo News Neediest Fund

**STEPHEN MULÉ**

Senior vice president/chief retail officer, Bank of Akron

- ▶ **Contact:** 46 Main St., Akron, NY 14001
- ▶ **Joined firm:** 2012
- ▶ **College:** SUNY Buffalo State
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Christina
- ▶ **Children:** Ethan, Ryder
- ▶ **Favorite nonprofits:** Food Bank of WNY, Music is Art
- ▶ **If I won the lottery I would:** go on a family vacation.

**KEVIN MURPHY**

Market president, Bank of America

- ▶ **Contact:** 10 Fountain Plaza, Buffalo, NY 14202
- ▶ **Joined firm:** 1984
- ▶ **College:** B.A., Dartmouth College; 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

**DAVID NASCA**

President/CEO, Evans Bank

- ▶ **Contact:** One Grimsby Drive, Hamburg, NY 14075
- ▶ **Joined firm:** 2006
- ▶ **Professional designation:** CCM
- ▶ **College:** B.S., Canisius College; MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville

- ▶ **Spouse:** Mary Beth
- ▶ **Favorite nonprofits:** Brothers of Mercy, Catholic Charities, United Way
- ▶ **If I won the lottery I would:** buy a vacation home for out-of-town children to visit and host family gatherings.

**DENISE NEAMON**

Partner, Bonadio & Co. LLP

- ▶ **Contact:** 100 Riley St., East Aurora, NY 14052
- ▶ **Professional designation:** CPA
- ▶ **College:** Medaille College
- ▶ **Lives in:** East Aurora
- ▶ **Spouse:** David
- ▶ **Children:** Tristan, Alexis
- ▶ **Favorite nonprofits:** United Way, UB Center for Entrepreneurial Leadership, Boys and Girls Club
- ▶ **If I won the lottery I would:** by a beachfront home.

**MICHÉ NEEDHAM**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 2003
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Tonawanda
- ▶ **Spouse:** Matthew
- ▶ **Children:** Issac, Emily
- ▶ **Favorite nonprofits:** Buffalo & Erie County Botanical Gardens, Buffalo Zoo, Theatre of Youth
- ▶ **If I won the lottery I would:** buy a timeshare.

**MICHAEL NOWICKI**

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

- ▶ **Contact:** 10 Fountain Plaza, Buffalo, NY 14202
- ▶ **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

**DAVID OESTREICHER**

Financial adviser, ROI Financial Group

- ▶ **Contact:** 7 Limestone Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2002
- ▶ **Professional designation:** CPA, MBA, CLTC, CFP
- ▶ **College:** B.S., University of Massachusetts; MBA, University at Buffalo
- ▶ **Born in:** New York
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Susan
- ▶ **Children:** Jacqueline, Andrew
- ▶ **Favorite nonprofits:** Music is Art, JCC of Greater Buffalo, Center for Inquiry
- ▶ **If I won the lottery I would:** pay off my home mortgage..

**TED OEXLE**

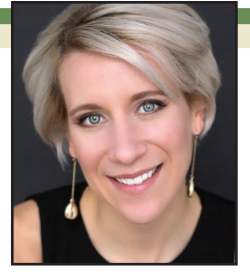
Western New York regional president, Five Star Bank

- ▶ **Contact:** 300 Spindrift Drive, Buffalo, NY 14221
- ▶ **Joined firm:** 2016
- ▶ **College:** SUNY Buffalo State
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Kenmore
- ▶ **Spouse:** Jennifer
- ▶ **Children:** Katharine, Cooper, Patrick
- ▶ **Favorite nonprofits:** Hilbert College, YMCA, SPCA
- ▶ **If I won the lottery I would:** first buy a bottle of champagne.

**ANTHONY OGOREK**

CEO, Ogorek Wealth Management LLC

- ▶ **Contact:** Sheridan Meadows Corporate Park North, Williamsville, NY 14221
- ▶ **Joined firm:** 1987
- ▶ **Professional designation:** Ed.D., CFP
- ▶ **College:** B.M., Rosary Hill College; B.S., Daemen College; Ed.D./M.A., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Janice
- ▶ **Favorite nonprofits:** Doctors Without Borders, Gerard Place, Catholic Charities
- ▶ **If I won the lottery I would:** start a charitable foundation.

**NICHOLLE OVERKAMP**

Financial adviser and retirement planning specialist, Wilcox Financial Group LLC

- ▶ **Contact:** 29 California Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2012
- ▶ **College:** B.A., Medaille College; MBA, University of Phoenix
- ▶ **Born in:** Williamsville
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Chris
- ▶ **Favorite nonprofits:** Prevention Focus, ECMC Foundation, Carly's Club
- ▶ **If I won the lottery I would:** buy a vacation for my entire family.

**LISA PALLADINO**

Partner, Bonadio & Co LLP

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 1996
- ▶ **Professional designation:** CPA
- ▶ **College:** Canisius College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Kenmore
- ▶ **Favorite nonprofits:** Girls on the Run of Buffalo, Susan G. Komen of WNY
- ▶ **If I won the lottery I would:** buy a trip for my entire immediate family.

**KEITH PARWULSKI**

Regional director, The Summit FCU

- ▶ **Contact:** 5641 Transit Road, East Amherst, NY 14051
- ▶ **Joined firm:** 2013
- ▶ **Professional**

FOCUS: WHO'S WHO IN BANKING & FINANCE

- **designation:** CUDE
- **College:** B.S., University at Buffalo; ABA, Fairfield University
- **Born in:** Buffalo
- **Lives in:** Clarence Center
- **Spouse:** Celia (deceased)
- **Children:** Stephanie, Stephen
- **Favorite nonprofits:** American Heart Association, Hospice Buffalo, Literacy New York Buffalo-Niagara
- **If I won the lottery I would:** pay off the mortgages of all my family members



JOHN PIERONI

Managing partner, WNY Asset Management LLC

- **Contact:** 6500 Sheridan Drive, Williamsville NY 14221
- **Joined firm:** 2001
- **Professional designation:** CFP
- **College:** B.A., University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Snyder
- **Spouse:** Maria
- **Children:** Jack, Luke, Will
- **Favorite nonprofits:** Buffalo City Mission, Community Foundation for Greater Buffalo, Depew Boys & Girls Club
- **If I won the lottery I would:** buy a car that says "vroom vroom" in Italian.



ROBERT POLLOCK

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

- **Contact:** 200 International Drive, Buffalo, NY 14221
- **Joined firm:** 1988
- **Professional designation:** CPA, CVA
- **College:** B.S., Canisius College; B.S., LeMoyné College
- **Born in:** Buffalo
- **Lives in:** East Amherst

- **Spouse:** Katherine
- **Children:** Michael, Elizabeth, Gregory, Jeffrey
- **Favorite nonprofits:** The Bison Fund, Say Yes Buffalo, Catholic Charities
- **If I won the lottery I would:** save it.



CHERYL PROUT

Partner, The Bonadio Group

- **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- **Joined firm:** 1998
- **Professional designation:** CPA
- **College:** B.S., Canisius College
- **Born in:** Buffalo
- **Lives in:** Lancaster
- **Spouse:** Dean
- **Children:** Lindsay, Michael
- **Favorite nonprofits:** Goodwill Industries of WNY, March of Dimes
- **If I won the lottery I would:** buy a house on the ocean in Florida.



KEVIN QUINN

Head of corporate Upstate NY and New England Region, HSBC Bank USA N.A.

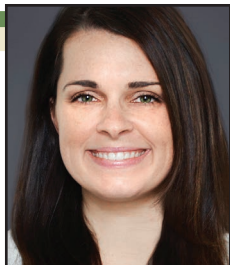
- **Contact:** 95 Washington St., Buffalo, NY 14273
- **Joined firm:** 2005
- **College:** B.A., University of Notre Dame; J.D., University of Buffalo; MBA University of Buffalo
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Spouse:** Therese Marie
- **Children:** Kate, Kevin, Emmet
- **Favorite nonprofits:** St. Mark Church, Nardin Academy, Canisius High School
- **If I won the lottery I would:** first buy a fish fry and cold beer at Hoak's Restaurant.



JAMES RAHILL

Team leader, Community Bank N.A.

- **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- **Joined firm:** 2015
- **College:** B.S. and MBA, Canisius College
- **Born in:** Buffalo
- **Lives in:** Amherst
- **Spouse:** Patty
- **Children:** James, David, Elizabeth, Kathryn
- **Favorite nonprofits:** Catholic Charities, United Way, Boys and Girls Club
- **If I won the lottery I would:** buy real estate.



ANGELA REA

Retirement team leader, Lawley

- **Contact:** 361 Delaware Ave., Buffalo, NY 14202
- **Joined firm:** 2016
- **Professional designation:** AIF
- **College:** B.S., SUNY Geneseo
- **Born in:** Buffalo
- **Lives in:** East Amherst
- **Spouse:** Michael
- **Favorite nonprofits:** SPCA, Roswell Park Alliance Foundation, Crohn's & Colitis Foundation



JAMIE REHAK

Managing director, Lawley

- **Contact:** 361 Delaware Ave., Buffalo, NY 14202
- **Joined firm:** 2010
- **Professional designation:** AIF, ChFC, REBC, CLU
- **College:** B.S., SUNY Buffalo State
- **Born in:** Buffalo
- **Lives in:** Williamsville
- **Spouse:** Kelly

- **Children:** Meegan, J.P.
- **Favorite nonprofits:** Jericho Road Community Health Center, The Arc Erie County New York, Roswell Park Alliance Foundation



DANIEL REININGA

President/CEO, Lake Shore Savings Bank

- **Contact:** 31 E. Fourth St., Dunkirk, NY 14048
- **Joined firm:** 1994
- **College:** B.S., Allegheny College; MBA, University of South Florida; graduate degree in banking, ABA Stonier Graduate School of Banking
- **Born in:** Dunkirk
- **Lives in:** Pomfret
- **Spouse:** Wendy
- **Children:** Elizabeth, Mark, Parker, Alex
- **Favorite nonprofits:** Mikey's Way, Buffalo Hearing and Speech Center, Fredonia College Foundation
- **If I won the lottery I would:** buy an airplane that I could use to fly sick children around the country for medical treatment.



LOUIS RIVERA

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

- **Contact:** 5892 Main St., Williamsville, NY 14221
- **Joined firm:** 2015
- **College:** Old Dominion University
- **Born in:** Hartford, Conn.
- **Lives in:** Kenmore
- **Spouse:** Stacey
- **Children:** Jacob, Laurel, Reilly
- **Favorite nonprofits:** Ducks Unlimited, Habitat for Humanity, Big Brothers Big Sisters of WNY
- **If I won the lottery I would:** buy real estate.



MARC ROSENTHAL

Financial adviser, ROI Financial Group

- **Contact:** 7 Limestone Drive, Williamsville, NY 14221
- **Joined firm:** 2001
- **Professional designation:** CLTC
- **College:** University at Buffalo
- **Born in:** Williamsville
- **Lives in:** Clarence
- **Spouse:** Patricia Rosenthal
- **Children:** Noah, Adam, Ava
- **Favorite nonprofits:** Camp Good Days and Special Times, Crohn's and Colitis Foundation, Amherst Youth Hockey
- **If I won the lottery I would:** set aside a sum of money and begin a charitable family foundation.



PATRICK SALADYGA

Retirement plan adviser, Lawley

- **Contact:** 361 Delaware Ave., Buffalo, NY 14202
- **Joined firm:** 2017
- **College:** B.S., Canisius College
- **Born in:** Buffalo
- **Lives in:** Buffalo
- **Spouse:** Meg
- **Favorite nonprofits:** The Movember Foundation, Buddy's Second Chance Rescue, American Foundation for Suicide Prevention



JOHN SANDERSON

President, Sanderson Wealth Management

- **Contact:** 50 Fountain Plaza, Buffalo, NY 14202
- **Joined firm:** 2001
- **Professional designation:** CPA, CIMA
- **College:** Niagara University
- **Born in:** North Tonawanda
- **Lives in:** Orchard Park
- **Spouse:** Karen
- **Children:** Jason, Justin
- **Favorite nonprofits:** Albright-Knox Art Gallery, Niagara University, Buffalo Zoo
- **If I won the lottery I would:** create a private foundation for the benefit of local charities.



MIMI SCHANZLIN

Managing director, United Capital Financial Advisers

- **Contact:** 374 Delaware Ave., Buffalo, NY 14202
- **Joined firm:** 2012
- **Professional designation:** CFP
- **College:** B.S., Boston College; MBA, University at Buffalo
- **Born in:** Buffalo
- **Lives in:** Kenmore
- **Spouse:** John
- **Children:** Matthew, Jacqueline
- **Favorite nonprofits:** Roswell Park Comprehensive Cancer Center, Hospice, United Way
- **If I won the lottery I would:** buy a cruise for my extended family.

FOCUS: WHO'S WHO IN BANKING & FINANCE

**DAVID SCHLEIN**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1980
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., accounting, University at Buffalo
- ▶ **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
- ▶ **If I won the lottery I would:** set up a foundation that would provide scholarships or other financial assistance for medical practitioners to practice in areas that are underserved.

**JAMES SEGGARA**

Managing partner, Tronconi Segarra & Associates

- ▶ **Contact:** 8321 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 1995
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., Canisius College
- ▶ **Born in:** Niagara Falls
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Ann
- ▶ **Children:** Kailee, Justyn
- ▶ **If I won the lottery I would:** buy another CPA firm.

**CHRISTOPHER SHAFER**

Senior vice president/branch director, RBC Wealth Management

- ▶ **Contact:** 6225 Sheridan Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2005
- ▶ **College:** B.S., Bowling Green State University
- ▶ **Born in:** Stamford, NY
- ▶ **Lives in:** Williamsville
- ▶ **Spouse:** Martha
- ▶ **Children:** Matthew, Adam, Lindsay, Jessica
- ▶ **Favorite nonprofits:** One in Six Foundation, The Buffalo Philharmonic, United Way
- ▶ **If I won the lottery I would:** fund research to help find a cure for ALS, which has personally affected my family.

**TRACY SHERWOOD**

President, Ogorek Wealth Management LLC

- ▶ **Contact:** Sheridan Meadows Corporate Park North, Williamsville, NY 14221
- ▶ **Joined firm:** 1994
- ▶ **Professional designation:** CFP
- ▶ **College:** B.S., SUNY College at Brockport
- ▶ **Born in:** Lockport
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Todd
- ▶ **Children:** Trenton, Andrew
- ▶ **Favorite nonprofits:** United Way, Make-A-Wish Foundation, Hospice
- ▶ **If I won the lottery I would:** use some of the money to buy lasting memories with my 13- and 9-year-old sons.

**JEFFREY SMITH**

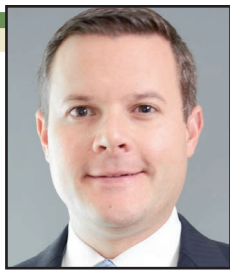
Resident director, Merrill Lynch

- ▶ **Contact:** 50 Fountain Plaza, Buffalo, NY 14202
- ▶ **Joined firm:** 2011
- ▶ **Professional designation:** CFP
- ▶ **College:** B.A., math, Suny Geneseo
- ▶ **Born in:** Lockport
- ▶ **Lives in:** Pittsford
- ▶ **Spouse:** Linda
- ▶ **Children:** Chase, Jack
- ▶ **Favorite nonprofits:** Canisius High School, Boys and Girls Club, Kids Escaping Drugs
- ▶ **If I won the lottery I would:** buy a private plane.

**MICHAEL TAYLOR**

SVP, New York Business Development Corp.

- ▶ **Contact:** 300 International Blvd., Williamsville, NY 14221
- ▶ **Joined firm:** 2005
- ▶ **College:** B.S., University at Buffalo; MBA, Canisius College

**TODD TEVENS**

Managing director, Lawley

- ▶ **Contact:** 361 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2011
- ▶ **Professional designation:** AIF
- ▶ **College:** B.A., Mercyhurst College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Snyder
- ▶ **Spouse:** Andrea
- ▶ **Children:** Tyler, Tanner, Trevor
- ▶ **Favorite nonprofits:** Catholic Charities, St. Joseph's Collegiate Institute, Buffalo Goes Gray

**MICHAEL TODARO**

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

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **College:** B.A., Colgate University; MBA, New York University's Stern School of Business

**MICHELE TROLLI**

Executive vice president/ chief technology and operations officer, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **College:** B.S., John Carroll University

**JAMES TYRPAK**

President, Tyrpak Financial Associates

- ▶ **Contact:** 6622 Main St., Williamsville, NY 14221
- ▶ **Joined firm:** 1988
- ▶ **Professional designation:** MSFS, CLU, ChFC, AEP
- ▶ **College:** B.A., University at Buffalo; MSFS, The American College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Donna
- ▶ **Children:** Michael, Jeffrey
- ▶ **Favorite nonprofits:** Buffalo Rotary Foundation, Society of FSP Foundation, Community Foundation for Greater Buffalo

**MARIO URSO**

Managing partner, The Bonadio Group

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 1990
- ▶ **Professional designation:** CPA, FHFMA
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Amherst
- ▶ **Spouse:** Linda
- ▶ **Children:** Jessica, Mario
- ▶ **Favorite nonprofits:** BCAT, United Way, Catholic Charities
- ▶ **If I won the lottery I would:** buy a luxury bike tour across the U.S.

**COURTLAND VAN DEUSEN**

Partner, Lumsden & McCormick LLP

- ▶ **Contact:** 369 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 2001
- ▶ **Professional designation:** CPA
- ▶ **College:** BBA, accounting, Niagara University
- ▶ **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
- ▶ **If I won the lottery I would:** buy whatever my wife tells me to buy!

**CYNTHIA VANCE**

CFP, Jensen Marks Langer & Vance LLC

- ▶ **Contact:** 360 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 1997
- ▶ **Professional designation:** CFP, ChFC
- ▶ **College:** B.A., Michigan State University; MBA, Xavier University; J.D., University at Buffalo School of Law
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Snyder
- ▶ **Spouse:** Scott Smith
- ▶ **Children:** Jack
- ▶ **Favorite nonprofits:** Center for Elder Law & Justice, People Inc., WNED/WBFO
- ▶ **If I won the lottery I would:** buy a Warhol painting.

**NICHOLAS VERBANIC**

Vice president/ portfolio manager, Nottingham Advisors

- ▶ **Contact:** 100 Corporate Parkway, Amherst, NY 14226
- ▶ **Joined firm:** 1990
- ▶ **Professional designation:** CFP
- ▶ **College:** University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Laura
- ▶ **Children:** Greyson, Owen
- ▶ **Favorite nonprofits:** Salvation Army, Roswell Park Comprehensive Cancer Center

FOCUS: WHO'S WHO IN BANKING & FINANCE



LISA WALSH

Senior vice president, investments/branch manager, The Walsh Group of Raymond James

- ▶ **Contact:** 468 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2014
- ▶ **College:** B.S., University of Rochester
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Kenmore
- ▶ **Spouse:** Peter
- ▶ **Children:** Katie, P.J.
- ▶ **Favorite nonprofits:** Nardin Academy, Roswell Park Comprehensive Cancer Center, Canisius High School
- ▶ **If I won the lottery I would:** buy clothes for women's and children's shelters.



PETER WALSH

Senior vice president, investments/managing director, The Walsh Group of Raymond James

- ▶ **Contact:** 468 Delaware Ave., Buffalo, NY 14202
- ▶ **Joined firm:** 2014
- ▶ **College:** B.S., University of Maryland
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Spouse:** Lisa
- ▶ **Children:** Katie, P.J.
- ▶ **Favorite nonprofits:** Hospice, Buffalo Olmsted Parks, 716Squash
- ▶ **If I won the lottery I would:** buy a new car for my wife.



D. SCOTT WARMAN

Executive vice president/treasurer, M&T Bank

- ▶ **Contact:** One M&T Plaza, Buffalo, NY 14203
- ▶ **Joined firm:** 1995
- ▶ **College:** Canisius College



KATIE WEIBEL

Chief financial officer/managing partner, Turning Tides Financial

- ▶ **Contact:** 2821 Wehrle Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 2013
- ▶ **Professional designation:** CDFA
- ▶ **College:** B.A., business communications and marketing, University at Buffalo; MBA, Wilmington College
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** East Amherst
- ▶ **Spouse:** Jay
- ▶ **Children:** Sarabeth, Meredith, Jake
- ▶ **Favorite nonprofits:** St. Jude Children's Research Hospital, March of Dimes, Northtowns Pregnancy Center, Habitat for Humanity
- ▶ **If I won the lottery I would:** tithe and then go on a vacation with my family.



JONATHAN WEIR

Managing partner, Weir Financial Resources

- ▶ **Contact:** 737 Main St., Buffalo, NY 14203
- ▶ **Joined firm:** 1994
- ▶ **College:** B.A., Boston University; J.D., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Buffalo
- ▶ **Favorite nonprofits:** American Cancer Society, Food Bank of WNY, NYIA Scholarship Fund
- ▶ **If I won the lottery I would:** set up a family trust and foundation.



STEVEN WOODARD

President/CEO, Alden State Bank

- ▶ **Contact:** 13216 Broadway, Alden, NY 14004
- ▶ **Joined firm:** 1986
- ▶ **College:** B.S., Liberty University; MBA, University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Alden
- ▶ **Spouse:** Lisa
- ▶ **Children:** Parker, Casey
- ▶ **Favorite nonprofits:** Heritage Christian Services, Buffalo City Mission



BRUCE ZGODA

CPA, Zgoda & Associates CPAs PC

- ▶ **Contact:** 17 Limestone Drive, Williamsville, NY 14221
- ▶ **Joined firm:** 1975
- ▶ **Professional designation:** CPA
- ▶ **College:** B.S., University at Buffalo
- ▶ **Born in:** Buffalo
- ▶ **Lives in:** Clarence
- ▶ **Spouse:** Cathy
- ▶ **Children:** Todd, Scott, Jill
- ▶ **Favorite nonprofits:** Nativity Parish, Catholic Charities, Wings Flights of Hope
- ▶ **If I won the lottery I would:** not buy anything. God has given Cathy and I all we need.



TOM ZUGGER

Insurance agent, MassMutual/McDermid Financial Group

- ▶ **Contact:** 37 Franklin St., Buffalo, NY 14202
- ▶ **Joined firm:** 1985
- ▶ **Professional designation:** CLU, ChFC, CLTC
- ▶ **College:** B.S., St. Bonaventure University
- ▶ **Born in:** Atlanta
- ▶ **Lives in:** Lake View
- ▶ **Spouse:** Colleen
- ▶ **Children:** Mollie, Kellie
- ▶ **Favorite nonprofits:** Queen of Angels Church, Hamburg Soccer Club, Nardin Academy
- ▶ **If I won the lottery I would:** start a private charitable foundation.