

2025

ACG University Directory



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ACG University 2025 Class Dates:

Class 1: DealSourcing

Class 2: Due Diligence

Class 3: Valuation

Class 4: LBO Financing

Class 5: Purchase Agreement Negotiations

Class 6: Integration

Class 7: Exit Strategies

Special Thanks to:



ABOUT ACGU:

Founded by ACG Philadelphia in 2010, ACG University is in its 14th year with a strong, engaged alumni network of over 400 dealmakers. Its success has been widely recognized and is being replicated by other ACG Chapters around the country.

ACG University is an exclusive, in-depth deal education and networking program, targeting up-and-coming M&A dealmakers and is designed to:

- Teach a broad range of essential deal-making skills and strategies through lectures and hands-on casework.
- Create cohorts which will facilitate long-term relationship/network building among future M&A leaders within the deal community.
- Offer access to all the resources of ACG and the broader deal community in Philadelphia with graduates becoming part of the ACG Young Dealmakers Group.

The Class of 2025 will be immersed into the life cycle of a deal using a case study methodology for teaching the key elements of sourcing, negotiating, structuring, and closing a deal. Each class will be led by the region's top dealmakers and will include pre-reading, expert-level instruction, team-based casework/presentation of findings and feedback.

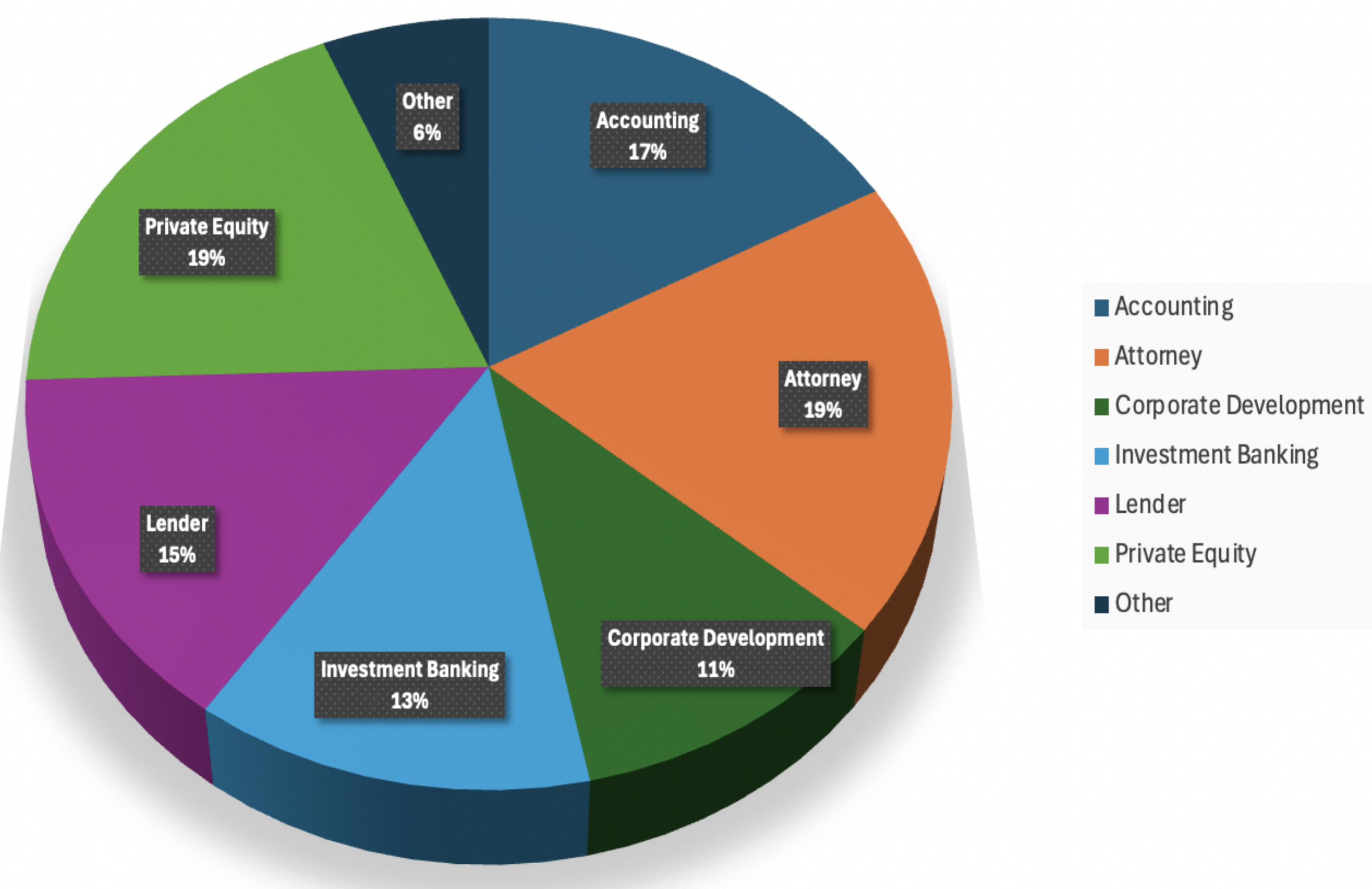
ABOUT ACG PHILADELPHIA:

The Philadelphia Chapter of the Association for Corporate Growth (ACG) is the leading network for middle market M&A professionals focused on facilitating relationships valuable in sourcing and successfully completing transactions, educating dealmakers on trends and best practices, and promoting awareness of our vibrant dealmaking community. In Philadelphia, you'll join over 650 of our region's most successful financial and strategic dealmakers. There are more than 15,000 dealmakers to connect with around the globe as a member of ACG!

THE CLASS OF 2025

In 2025, we have 47 participants across 6 core functional areas. In each class, you'll be assigned to a 7-8 person team and your engagement will be important to your team's success. For each class, you will be assigned to a different team in order to facilitate networking among the entire class. Class team assignments will be distributed a week before class with the class materials.

ACGU CLASS OF 2025 BREAKDOWN BY FUNCTION



John Alfredson

VP, Senior Credit Underwriter, First Bank NJ



Email: jtalfredsen@yahoo.com

Most Recent Education: Long Island University-CW Post Campus, 2017, MBA

What people may not know about you: I was previously in the U.S. Marine Corps and also owned an auto repair shop.

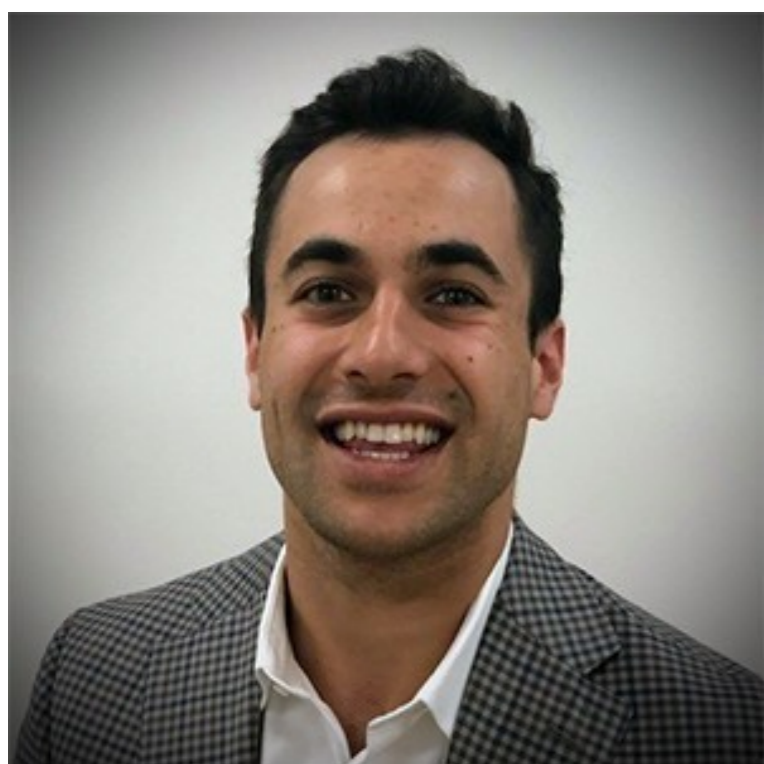
Favorite Restaurant & Order: The Chilean sea bass with haricots verts from Butcher and Singer on Walnut Street is amazing, which is tied in deliciousness with a cheesesteak from Dalessandro's. For a drink, the Bartender's Choice from the Ranstead Room is always a good option.

What are you currently reading? The Book of Enoch

Most Recent Deal: Acquisition of a company that specializes in the sale of proprietary track systems for hospital curtains.

Brian Altman

Valuation Manager, Centri Business Consulting



Email: baltman@centriconsulting.com

Most Recent Education: Bachelor of Science at Penn State University

What people may not know about you: My family runs an animal rescue in Pennsylvania.

Favorite Restaurant & Order: Barclay Prime - American Wagyu Ribeye

What are you currently reading? The Contrarian - Peter Thiel and Silicon Valley's Pursuit of Power

Caio Azevedo

Associate, NewSpring Capital



Email: Caioazv@icloud.com

Most Recent Education: Wharton MBA 2022

What people may not know about you: I was born in Brazil and I am an identical twin.

Favorite Restaurant & Order: Lazer Wolf

What are you currently reading? Steve Jobs Biography - Walter Isaacson

Most Recent Deal: Add-on acquisition of an MSP business based out of Alabama.

Yasi Bastaniasl

Growth Equity Analyst, NewSpring Capital



Email: ybastaniasl@newspringcapital.com

Most Recent Education: Saint Joseph's University 2019
Undergraduate

What people may not know about you: I was born and raised in Iran and moved here when I was 14

Favorite Restaurant & Order: Suraya! I love ordering any of the dips with Pita and always add a side of sumac fries

What are you currently reading? The Alice Network

Most Recent Deal: Trio Mobil - industrial IoT company based in Istanbul

James Burns

TriState Capital Bank



Email: jburns@tscbank.com

Most Recent Education: Villanova, 2019 MBA

What people may not know about you: I tried out, unsuccessfully, for the West Virginia University football team.

Favorite Restaurant & Order: North 3rd in Northern Liberties. Burger and fries along with an order of wings with mild sauce.

What are you currently reading? Flash Boys

Most Recent Deal: Working on a deal with a client to buy a building and an existing business.

Julianna Clark

Associate, Full Guard Capital



Email: julianna.r.clark@fullguardcapital.com

Most Recent Education: Haverford College, 2021 Undergraduate

What people may not know about you: I played college basketball and hope to coach one day!

Favorite Restaurant & Order: Dim Sum Garden! I recommend all the soup dumplings!

What are you currently reading? Legendary - Stephanie Garber

Most Recent Deal: Add-on acquisition closed September 2024 - Library Interiors of Texas

Charles Condro
Associate, Morgan Lewis



Email: charles.condro@morganlewis.com
Most Recent Education: UVA Law 2019
What people may not know about you: Made several appearances as Nutzy the Flying Squirrel and Zinger the Acorn when I worked for my hometown minor league baseball team, the Richmond Flying Squirrels.
Favorite Restaurant & Order: Love & Honey Fried Chicken: OG Fried Chicken Sandwich
What are you currently reading? Band of Brothers - Stephen Ambrose

Phil Cooke
Senior Associate, Mereo Capital Partners



Email: pcooke@mereocap.com
Most Recent Education: Wharton, MBA Program, Class of 2024
What people may not know about you: Throughout high school and college I privately studied classical composition and still write classical music in my free time.
Favorite Restaurant & Order: Friday Saturday Sunday — the tasting menu is excellent.
What are you currently reading? Sapiens
Most Recent Deal: Add-ons for a podiatry roll-up



Nicholas D'Andrea

Manager - TAS & M&A Advisory, Trout CPA



Email: ndandrea@troutcapital.com

Most Recent Education: The University of Scranton, Master of Accountancy 2016

What people may not know about you: I was an extra in the movie Creed.

Favorite Restaurant & Order: 1) Zahav 2) Ralph's Italian Restaurant 3) Laser Wolf 4) Angelo's

What are you currently reading? The 7 Habits of Highly Effective People - Stephen Covey

Aylin Daldal

Associate, Kleinbard LLC



Email: adaldal@kleinbard.com

Most Recent Education: University of Michigan Law School Class of 2019

What people may not know about you: I speak Turkish fluently.

Favorite Restaurant & Order: Friday, Saturday Sunday

What are you currently reading? The Goldfinch

Most Recent Deal: (i) private equity acquisition of a construction company and (ii) the sale of an insurance adjustment company to private equity

Charlotte Damico

Associate, Faegre Drinker



Email: charlotte.damico@faegredrinker.com

Most Recent Education: Drexel Kline School of Law, 2020

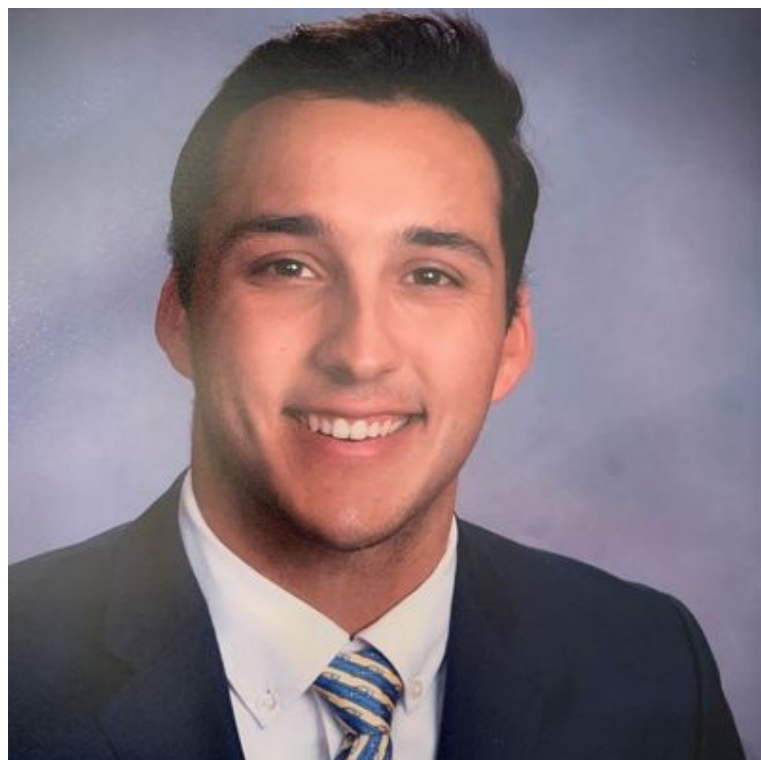
What people may not know about you: I was on an episode of a Netflix show

Favorite Restaurant & Order: Any and all rolls from Royal Izakaya

What are you currently reading? Remarkably Bright Creatures - Shelby Van Pelt

Brandon Davis

Associate Banker, JP Morgan Chase



Email: brandon.davis@chase.com

Most Recent Education: Loyola University Maryland, 2020
Undergraduate

What people may not know about you: I'm 1 of 6 siblings

Favorite Restaurant & Order: Saloon - Seafood Platter

What are you currently reading? How To Win Friends And Influence People

Matt Devine

Associate Attorney, Royer Cooper Cohen & Braunfield



Email: mdevine@rccbblaw.com

Most Recent Education: 2016 Temple Law

What people may not know about you: Huge NBA fan in general and a die-hard Celtics fan in particular (I grew up in RI, sorry!)

Favorite Restaurant & Order: Zahav

What are you currently reading? Wish I had time for books. Spare time is watching Celtics and binging Brooklyn 99

Most Recent Deal: M&A was a small asset and real estate deal in Indiana Growth Equity was 2 new VC fund formations

Kendeil Dorvilier

Associate Attorney, McCarter & English, LLP



Email: kdorvilier@mccarter.com

Most Recent Education: Villanova, 2021 MBA (2020 JD)

What people may not know about you: After my first discovery flight a few years ago, I aspire to earn a private pilot's license.

Favorite Restaurant & Order: Vernick Fish (chef's counter seating) - Halibut with a side of broccolini

What are you currently reading? Let My People Vote - Desmond Meade

Most Recent Deal: In the context of M&A deals, I most recently represented FMC Corporation in the divestiture of its non-crop business line, which closed on November 1, 2024.

Raymond Farnesi

Wealth Strategy Associate, UBS



Email: Raymond.farnesi@ubs.com

Most Recent Education: Drexel University, 2020 Undergraduate

What people may not know about you: I have a fraternal twin brother.

Favorite Restaurant & Order: Favorite restaurant is Butcher and Singer and my order is New York Strip medium rare.

What are you currently reading? Crime and Punishment - Fyodor Dostoevsky

Andrew Finger

Senior Director, Day & Zimmerman



Email: Andrew.Finger@dayzim.com

Most Recent Education: St. Joseph's University, MBA

What people may not know about you: I've run 9 marathons

Favorite Restaurant & Order: Restaurant: Vedge - Rutabega Fondue
Bar: Good Dog - Local Draft Beer

What are you currently reading? Make Your Bed - Admiral William McRaven

Most Recent Deal: A GovCon security firm

Jourdan Garvey

Associate Attorney, Blank Rome LLP



Email: jourdan.garvey@blankrome.com

Most Recent Education: Villanova School of Law, 2018 JD

What people may not know about you: I am the mom of a 3-year-old and a 1-year-old...who often provide me with my toughest negotiations.

Favorite Restaurant & Order: Parc, Steak Frites

What are you currently reading? Listen for the Lie - Amy Tinter

Amanda George

Strategic Business Analyst, CertainTeed



Email: amanda.l.george@saint-gobain.com

Most Recent Education: University Of Tennessee @ Chattanooga 2019

What people may not know about you: I lived in Las Vegas for a year!

Favorite Restaurant & Order: Friday Saturday Sunday; always a new menu but you can never go wrong.

Runner up - my apartment :)

What are you currently reading? Radical Candor (for development)
Lessons in Chemistry (for fun)

Robert Heitzman

Senior Manager, CBIZ (formerly Marcum, LLP)



Email: robert.heitzman@cbiz.com

Most Recent Education: Villanova, 2025, Master of Taxation

What people may not know about you: I played baseball in college

Favorite Restaurant & Order: Estia, I recommend the lamb chops!

What are you currently reading? Where Good Ideas Come From - Steven Johnson

Emma Hinman

Manager, PwC



Email: emma.s.hinman@pwc.com

Most Recent Education: Northeastern University, MSA

What people may not know about you: I love to fly fish!

Favorite Restaurant & Order: Pub and Kitchen - love their burger without a bun!

What are you currently reading? Just finished the Seven Husbands of Evelyn Hugo

Sujit Hiremath

Associate, Milestone Partners



Email: shiremath@milestonepartners.com

Most Recent Education: Drexel, 2022 Undergraduate

What people may not know about you: Winter is my favorite season
—I enjoy skiing and watching ice hockey

Favorite Restaurant & Order: Dock Street, Prince Myshkin

What are you currently reading? Dune

Brandon Johnson

Associate, Fairmount Partners



Email: branmjohn@gmail.com

Most Recent Education: University of Pennsylvania, 2018
Undergraduate

What people may not know about you: I can solve a Rubix cube (but
it takes more than 45 seconds, more like a couple of minutes)

Favorite Restaurant & Order: Sampan - get the beef satay, General
Tso dumplings and/or the duck

What are you currently reading? How The Other Half Banks -
Mehrsa Baradaran

Most Recent Deal: CoreAVI

Susanne Kardaras

Manager, RSM US LLP



Email: Susie.Kardaras@rsmus.com

Most Recent Education: Penn State, 2019 MAcc

What people may not know about you: I snowboard

Favorite Restaurant & Order: Favorite restaurant: Suraya

Recommended order: Lamb Kawarma

What are you currently reading? The Nightingale

James McKenna

Analyst, Griffin Financial Group



Email: james.mckenna@griffinfinancialgroup.com

Most Recent Education: University of Delaware, 2021 -
Undergraduate degree in Finance

What people may not know about you: I have traveled to 19
different countries

Favorite Restaurant & Order: The Mulberry (19th and Arch) -
Mulberry Burger

What are you currently reading? Liar's Poker - Michael Lewis

Most Recent Deal: In early November, we closed a deal representing CCMC, a large-scale HOA community management based in the Southeast US. Our team approached a highly interested targeted list of potential buyers, negotiating and ultimately closing with Charlesbank on an expedited timeline

Ian Moore

Associate, Fairmount Partners



Email: ian.moore@fairmountpartners.com

Most Recent Education: Drexel University, 2020 Undergraduate

What people may not know about you: Big sports fan

Favorite Restaurant & Order: Finn McCool's!

What are you currently reading? None

Most Recent Deal: Acquisition of a power electronics manufacturer

Gabriella Munneke

Manager, CFGI



Email: gmunneke@cfgi.com

Most Recent Education: Villanova Master's in 2018. Undergraduate at the University of Florida in 2017.

What people may not know about you: I have two crazy Australian Shepherds!

Favorite Restaurant & Order: Double Knot and Pizza Shackamaxon

What are you currently reading? Not currently reading one. I'm open to some good recommendations!

Stephanie Muscelli

Senior Associate, Hidden River Strategic Capital



Email: smuscelli@hiddenrivercap.com

Most Recent Education: MBA at The Wharton School, University of Pennsylvania | Class of 2022

What people may not know about you: I worked at an art gallery in New Orleans the summer before IB orientation

Favorite Restaurant & Order: Ambrosia - Squid Ink Pasta

What are you currently reading? On Love - Alain de Botton

Most Recent Deal: \$875mm buyout of Certinia, a provider of professional services automation software (closed July 2023). I haven't closed a deal at HRSC yet.

Reid Oetting

Associate, Troutman Pepper



Email: reid.oetting@troutman.com

Most Recent Education: The College of William and Mary, 2020 JD & MBA

What people may not know about you: I sing and play the piano and guitar.

Favorite Restaurant & Order: Restaurant: The Dandelion - Shepherd's Pie and a Pimm's Cup

What are you currently reading? Monsoon - Wilbur Smith and Green Lights - Matthew McConaughey

Most Recent Deal: Sell-side transaction for a large registered investment advisor

Jessica Origlio

Associate, Ballard Spahr LLP



Email: origlioj@ballardspahr.com

Most Recent Education: Temple Law, 2019, JD

What people may not know about you: I sold an oil painting of a cactus in high school for \$30,000. It was the first and only painting that I ever sold.

Favorite Restaurant & Order: Tied between Her Place, Fiorella, or High Street. I have never had a bad bite of food at any of them.

What are you currently reading? The second book in the Throne of Glass series

Ankit (Kit) Patel

M&A Associate, Align Business Advisory



Email: appatel615@gmail.com

Most Recent Education: University of Massachusetts Amherst, 2014 BBA

What people may not know about you: I have a passion for cooking. Growing up, I dreamed of becoming a professional chef and owning my own restaurant.

Favorite Restaurant & Order: Restaurant - Angelos (Cheesesteak w/ Cooper Sharp) Bar - Next of Kin or The Ranstead Room

What are you currently reading? The Art of Seducing Your Customers Trevor Noah: Born a Crime

Most Recent Deal: Physician Practice Management

Tyler Peltz

Associate, Spring Capital Partners



Email: tjp@springcap.com

Most Recent Education: Drexel University, 2019 Undergraduate

What people may not know about you: I am a huge soccer fan (FC Barcelona)

Favorite Restaurant & Order: Restaurant Alba (in Malvern).
Whipped ricotta bruschetta

What are you currently reading? Power Failure - William D. Cohan

Most Recent Deal: \$12 million mezzanine debt and equity investment in a medical curtain manufacturer

Michael Perlmutter

Senior Consultant, CBIZ Advisors, LLC



Email: michael.perlmutter@cbiz.com

Most Recent Education: Penn State, Masters in Accounting 2017

What people may not know about you: I can solve a Rubix cube in under a minute! Thank you for the assistance!

Favorite Restaurant & Order: John's Roast Pork. Regular cheesesteak (American with onions).

What are you currently reading? Dune - Frank Herbert

Barrett Pittman

Analyst, Argosy Private Equity



Email: bpittman@argosycapital.com

Most Recent Education: Clemson University, 2023 Bachelor of Mechanical Engineering

What people may not know about you: I have run 6 marathons and am training for an ultra

Favorite Restaurant & Order: Zorbas in Fairmount. Always order a Gyro

What are you currently reading? Game of Thrones: A Clash of Kings (book 2)

Most Recent Deal: Rita's Water Ice Franchise Exit

Chris Polisano

Associate, Goodwin Procter LLP



Email: cpolisano@goodwinlaw.com

Most Recent Education: Villanova Law School, 2019

What people may not know about you: I speak Italian and I'm trying to learn Spanish (I married into a Puerto Rican family)

Favorite Restaurant & Order: The Saloon. Veal parmesan.

What are you currently reading? None! I read too much at work to want to read anything for pleasure.

Evan Riddell

Senior Associate, Berwind



Email: evan.riddell@berwind.com

Most Recent Education: Lehigh University, 2019 Masters in Financial Engineering

What people may not know about you: I play a lot of No-Limit Texas Hold'em poker

Favorite Restaurant & Order: Alpen Rose. Refined No. 01 and the dry-aged NY strip

What are you currently reading? How to Change - Katy Milkman

Most Recent Deal: Our sale of Oliver Packaging Company

Melanie Rioual

Financial Planning Analyst, ARG



Email: mrioual@argroupllc.com

Most Recent Education: Master in Finance 2018 (ESAM Lyon, France)

What people may not know about you: I am a certified diver and horse rider and I am from France

Favorite Restaurant & Order: I love Firebirds in Collegeville, the Wood Grilled NY Strip is amazing

What are you currently reading? The Assassin's Blades - Sarah J. Maas

Parth Sachar

Analyst, Argosy Private Equity



Email: psachar@argosycapital.com

Most Recent Education: Schreyer Honors College at Penn State, 2023 Undergraduate

What people may not know about you: Paragliding around the Swiss Alps

Favorite Restaurant & Order: Zahav - lamb dish

What are you currently reading? Extreme Ownership - Jocko Willink

Most Recent Deal: Heavy Equipment Colleges of America - vocational training school

Michael Schell

Senior Associate, Wipfli



Email: michael.schell@wipfli.com

Most Recent Education: Penn State, 2013 Masters of Accounting

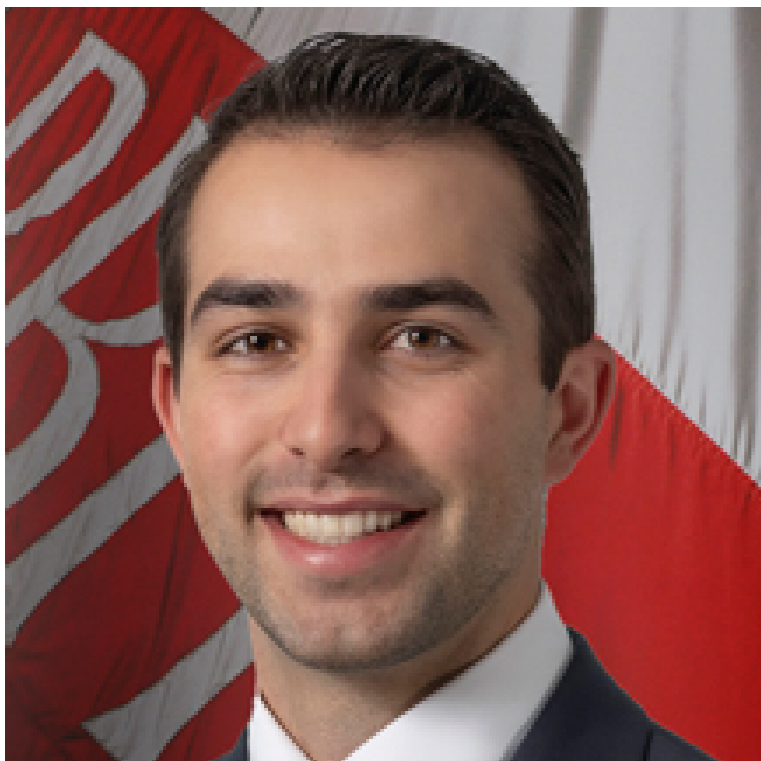
What people may not know about you: I had a hole-in-one on the island green (17th) at TPC Sawgrass

Favorite Restaurant & Order: Black Taxi / Guinness

What are you currently reading? Gaming the Game - Sean Patrick Griffin

Gregory Shamoon

Relationship Manager, Brown Brothers Harriman



Email: greg.shamoon@bbh.com

Most Recent Education: 2015 Undergraduate, University of San Diego

What people may not know about you: I lived in Madrid, Spain for 6 months.

Favorite Restaurant & Order: Tequila's Restaurant in Rittenhouse.

What are you currently reading? Lonesome Dove

Riley Slusarski

Investment Banking Associate, Janney Montgomery Scott



Email: rslusarski@janney.com

Most Recent Education: University of Pittsburgh, 2017 Undergraduate; CFA Charterholder

What people may not know about you: I once met Allen Iverson, my favorite Sixer of all time, at a casino in Washington, DC, and his security let me say hello to him only because my phone background was a picture of...Allen Iverson.

Favorite Restaurant & Order: Some of my favorites are probably Suraya, Kalaya, Giuseppe & Sons, Middle Child, Dan Dan, Pub & Kitchen, and Sabrina's.

What are you currently reading? Hell's Angels - Hunter S. Thompson

Andrew Smith

Associate, Boathouse Capital



Email: andrew.smith@boathousecapital.com

Most Recent Education: Middlebury College, Class of 2019

What people may not know about you: I started a beach parking app in college. It didn't work out as I expected, but it was a great experience.

Favorite Restaurant & Order: Suraya. I'd recommend everything, but the Kawarma if I had to pick!

What are you currently reading? A Walk in the Woods - Bill Bryson

Most Recent Deal: American Asphalt Sale to The Earle Companies

Michael Sutters

Vice President, Phoenix Capital Resource



Email: mike.sutters@jsheld.com

Most Recent Education: Millersville University, 2010 Undergraduate

Favorite Restaurant & Order: Zahav

What are you currently reading? The Toyota Way

Samantha Testa

Vice President, Delancey Street Partners



Email: samanthatesta7@gmail.com

Most Recent Education: Villanova, 2016, Undergraduate

What people may not know about you: I starred in an episode of Forensic Files when I was nine

Favorite Restaurant & Order: River Twice. Their tasting menu changes often, but is always amazing. If you can go on a Monday, the burger is a great add-on.

What are you currently reading? Four Thousand Weeks: Time Management for Mortals – Oliver Burkeman

James Turner

VP of Finance, Continuum Companies



Email: james@continuum-companies.com

Most Recent Education: Temple, 2018 Undergraduate

What people may not know about you: I love snowboarding and lived in Utah during the pandemic. I go back at least once each year to hit the slopes.

Favorite Restaurant & Order: Suraya, tasting menu

What are you currently reading? Who – Geoff Smart

Scott White

Portfolio Manager, Univest Bank



Email: whites1@univest.net

Most Recent Education: Temple University, 2019 Undergraduate

What people may not know about you: Enjoys traveling to national parks

Favorite Restaurant & Order: Richie's, breakfast wraps and the coffee

What are you currently reading? "Reentry"

Hunter Whitesel

Associate, Guardian Capital Partners



Email: hunter.whitesel@guardiancp.com

Most Recent Education: Penn State, 2020 Undergraduate

What people may not know about you: My go-to karaoke song is Shallow by Lady Gaga / Bradley Cooper

Favorite Restaurant & Order: I haven't been on the Philly food scene long but I have never had a bad cocktail at a bar

What are you currently reading? The Anxious Generation - Jonathan Haidt

Grace Yagodich

Associate, Graham Partners



Email: gyagodich@grahampartners.net

Most Recent Education: University of Tennessee, 2021
Undergraduate

What people may not know about you: I have gone by my middle name my entire life and share the same first name with my mother and sister!

Favorite Restaurant & Order: Parc - Moules Frites

What are you currently reading? American Dirt - Jeanine Cummins

Emily Zuleba

Associate, The Riverside Company



Email: EZuleba@RiversideCompany.com

Most Recent Education: University of Virginia, McIntire School of Commerce, 2022 Undergraduate

What people may not know about you: I just ran the NYC Marathon (my first marathon).

Favorite Restaurant & Order: The Love - The Lovebird - fried chicken

What are you currently reading? 20 Years Later - a mystery thriller about 9/11 and a murder investigation

Most Recent Deal: Currently working on outreach for our health and wellness franchisor platform