Mesirow

Mesirow Speakers Bureau

Reflecting the breadth and depth of our 85-year history as an independent, employee-owned financial services firm, Mesirow's subject matter experts span Global Investment Management, Capital Markets and Investment Banking and Wealth and Retirement Advisory Services, as well as corporate responsibility.

Sign up for Spark, our quarterly email featuring insights on markets, sectors and investing in what matters.

FOR MORE INFORMATION
mediainquiries@mesirow.com
Michael Herley | 203.308.1409

Wealth and Retirement Planning

Tiffany Irving, CFP®
Senior Vice President, Wealth Advisor
Wealth Management

EXPERTISE | Comprehensive wealth planning for high net worth families, business owners, and non-profits; wealth transfer strategies, retirement planning, planning for women and the LGBTQ+ community

Gregg Lunceford, Ph.D, CFP®
Senior Vice President, Wealth Advisor
Wealth Management

EXPERTISE | Retirement lifestyle planning, diversity, equity and inclusion in finance. Published author on retirement and financial planning.

Sumit L. Desai, CFA
Senior Vice President, Director of Research
Wealth Management

EXPERTISE | Due diligence of equity, fixed income and global tactical allocation investments, ETFs, market perspectives, portfolio strategy and implementation

Robert Martin, CFA
Vice President, Senior Investment Analyst
Wealth Management

EXPERTISE | Due diligence of equity, fixed income and global tactical allocation investments, ETFs, market perspectives, portfolio strategy and implementation

Diversity, Equity, and Inclusion

Carl H. Davis II
Senior Vice President, Head of Diversity, Equity and Inclusion and Corporate Recruitment
Human Resources

EXPERTISE | Diversity, equity and inclusion, corporate recruitment and retention

Retirement Plans

David Dermenjian, AIF®
President
Retirement Advisory Services

Christopher J. Pohlman, CRPS®, AIF®
Senior Managing Director
Retirement Advisory Services

EXPERTISE | Solutions for qualified retirement plan sponsors, defined plan management strategies and workflows

Fiduciary Solutions

Keith Gustafson, CFA
Managing Director, Asset Allocation and Retirement Income
Fiduciary Solutions

EXPERTISE | Asset allocation

Chris O'Neill, PhD, CFA, CFP®, FRM®, ChFC®
Managing Director, Chief Investment Officer and Director of Quantitative Research
Fiduciary Solutions

EXPERTISE | Retirement income

Wenli Tan, CFA
Managing Director
Fiduciary Solutions

Lavanya Batchu
Managing Director
Fiduciary Solutions

EXPERTISE | Manager due diligence

Macroeconomic

Cara Esser, CFA
Senior Vice President, Director of Portfolio Management and Research
Retirement Advisory Services

EXPERTISE | Macroeconomic and market insights, portfolio management and research, fiduciary expertise for retirement plan sponsors

Leo Harmon
Senior Managing Director, Chief Investment Officer, Portfolio Manager
Equity Management

EXPERTISE | Macroeconomic and equity market perspectives, financial services sector expertise, youth financial literacy education

Currency

Joseph P. Hoffman, CFA
Chief Executive Officer
Currency Management

EXPERTISE | Currency management strategies, FX trading, overlay strategies, derivatives, investment trends and customized solutions

Richard Turner
Managing Director, Head of Research
Currency Management

EXPERTISE | Machine learning, quantitative modeling, systematic FX trading, Artificial Intelligence applications to financial markets

Equity Management

Leo Harmon
Senior Managing Director, Chief Investment Officer, Portfolio Manager
Equity Management

EXPERTISE | Equity market insights, small and small-mid cap investing, banks and financial sector, research, macroeconomic views, sustainable/ESG investing, youth financial literacy education

Investment Management

Steve Swierczewski, CFA
Senior Managing Director
Global Investment Management Distribution

EXPERTISE | Investment management trends, traditional investments, alternative investments, capabilities for institutional investors

Capital Markets | Institutional Sales and Trading

George E. A. Barbar
Senior Managing Director
Institutional Sales and Trading

EXPERTISE | Rates, government agency, supranationals and structured products, civic and community engagement

Ali Haghighat
President and Head of Taxable Sales and Trading
Institutional Sales and Trading

EXPERTISE | Credit-related products, mortgages, asset-backeds, other derivatives

Mark Whitaker
Managing Director
Institutional Sales and Trading

EXPERTISE | Municipal research, funding, and trading

Investment Banking

Jeffrey A. Golman
Vice Chairman
Investment Banking

Yong-Jae Kim
Managing Director
Investment Banking

EXPERTISE | General mergers and acquisitions

Paul Mariani
Managing Director
Investment Banking

EXPERTISE | Food mergers and acquisitions

Andrew Carolus
Managing Director
Investment Banking

EXPERTISE | Aerospace and Defense mergers and acquisitions

John Chrysikopoulos
Managing Director
Investment Banking

EXPERTISE | Packaging mergers and acquisitions

Mesirow

mesirow.com

20220512-2198111-6891107