Mesirow Speakers Bureau

The Mesirow Speakers Bureau provides access to leading subject matter experts across the financial services landscape. Our experts frequently share insights on radio, TV, and podcasts, offering informed perspectives on markets, sectors, and the evolving investment landscape.

Media professionals are invited to connect with our speakers for commentary and analysis. We also invite you to stay ahead of key financial trends by subscribing to Spark, our quarterly newsletter featuring timely insights on the markets and investing in what matters.

FOR MORE INFORMATION

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Wealth and Retirement Planning

Jennifer Gartenberg, CFP®
Managing Director, Wealth Advisor
Wealth Management

EXPERTISE | Focus on investment, retirement and financial planning for families, non-profits and businesses. Specialized expertise in tax-advantaged investment strategies and selecting the right retirement account. Charitable giving strategies and financial acumen for women.

Tiffany Irving, CFP®, CEPA®
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®
Managing Director, 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
Senior 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

Rebecca Solomon , J.D., LL.M.
Estate Planning Specialist
Wealth Management

EXPERTISE | Focus on advanced tax planning. Specialized expertise in advising individuals, families and small business owners on tax implications and strategy considerations when building comprehensive financial plans and investment portfolios.

Gary Pattengale, CFP®
Senior Vice President, Advanced Planning Specialist
Wealth Advisor
Wealth Management

EXPERTISE | Focus on estate planning. Specialized expertise in advising individuals, families and small business owners on how to ensure that their estate plan aligns with their legacy goals.

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

Jason Handrinos
Senior Managing Director,
Global Head of Fixed Income Sales and Growth
Institutional Sales and Trading

EXPERTISE | Fixed income, Mesirow exposure across Europe and Asia

Mark Whitaker
Managing Director, Head of Municipal Research
Institutional Sales and Trading

EXPERTISE | Municipal research, funding, and trading

Investment Banking

Adam Oakley
Senior Managing Director
Co-Head of Investment Banking

EXPERTISE | General M&A, Aerospace & Defense, Diversified Industrials

Paul Mariani
Managing Director
Investment Banking

EXPERTISE | Food mergers and acquisitions

Melanie Yermack
Managing Director
Investment Banking

EXPERTISE | Packaging mergers and acquisitions

Rocky Pontikes
Senior Managing Director
Co-Head of Investment Banking

EXPERTISE | General M&A, Distribution & Supply Chain, Diversified Industrials

Lance Bell
Managing Director
Investment Banking

EXPERTISE | Healthcare Services mergers and acquisitions

Fiduciary Solutions

Keith Gustafson, CFA
Managing Director of 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

Currency

Joseph P. Hoffman, CFA
Chief Executive Officer
Currency Management

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

Uto Shinohara, CFA
Managing Director, Senior Investment Strategist
Currency Management

EXPERTISE | Currency management strategies, FX overlay strategies, market commentary

Richard Turner
Managing Director, Head of Research
Currency Management

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

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.