

Deloitte.



Future Forward Forum 2025 Speaker Biographies

Moderators

Speakers

Moderator

US economic update

Tuesday, December 2, 2025; 1:00 – 2:00 p.m. EST



Wolfe Tone

**Vice Chair & US Deloitte
Private Leader
Deloitte Tax LLP**

As the leader of US Deloitte Private, I am deeply passionate about the potential of private enterprises and the vital role they play in driving innovation and economic growth. That passion fuels my commitment to helping private companies navigate and thrive in today's ever-evolving business environment.

Throughout my nearly 29 years in professional services, I've experienced the power of our people coming together to advise our clients on making bold moves that can grow and transform their private enterprises. As a supporter of community involvement and education, I serve on the board of the United Way of Metro Chicago and the Advisory Board of the Tippie College of Business at the University of Iowa.

My wife and I reside in the Chicago area and are blessed with two wonderful children and a pair of very active Labradors. When I'm not supporting our kids and their activities, I enjoy fishing, traveling the world, and cheering for my beloved Iowa Hawkeyes.

Speaker

US economic update

Tuesday, December 2, 2025; 1:00 – 2:00 p.m. EST



Dr. Ira Kalish

**Chief US & Global
Economist**
Deloitte Services LP

Dr. Ira Kalish is the Chief US & Global Economist of Deloitte Touche Tohmatsu Ltd. He is a specialist in global economic issues as well as the effects of economic, demographic, and social trends on the global business environment. He has written about the economies of Western Europe, Eastern Europe, Southeast Asia, China, Japan, Mexico and South America, and has also written extensively on global consumer markets. He is the principal author and editor of Deloitte's Weekly Global Economic Update.

Dr. Kalish provides thought leadership and perspectives on economic issues, including their expected impact on business operations and trends, to Deloitte clients as well as Deloitte leadership. He has given numerous presentations to corporations and trade organizations on topics related to the global economy. Dr. Kalish also serves on the Business at OECD Economic Policy Committee which advises the OECD on macroeconomic policy issues. In addition, he serves on the World Economic Forum's Community of Chief Economists. He is widely traveled and has given presentations in 47 countries on six continents.

Dr. Kalish has been widely quoted in the news media; his remarks have been published by the Wall Street Journal, The Economist, The Financial Times, Reuters, and The Washington Post. He has appeared on CNN, CBS News, CNBC, PBS and BBC World Service.

Prior to his work at Deloitte, Dr. Kalish was chief economist at Retail Forward, a director at PwC, vice president at Bankers Trust, corporate economist at the Eastman Kodak Company, and researcher at the Institute for International Economics.

Dr. Kalish holds a bachelor's degree in economics from Vassar College and a PhD in international economics from Johns Hopkins University. He lives in Los Angeles, CA with his wife and daughters.

Moderator

Public accounting technical update

Tuesday, December 2, 2025; 2:30 – 3:30 p.m. EST



Donald Heisler

Managing Partner

Deloitte & Touche LLP

Don Heisler is a partner with Deloitte & Touche LLP and serves as its Seattle Managing Partner, responsible for representing Deloitte and its four world-class businesses, including Audit, Tax, Advisory and Consulting, in the Seattle market, and steward to Deloitte's commitment to and support of the Seattle community at large. In his 30 years with Deloitte, Don has served all manner of clients, from large public multi-national fortune 100 companies to start-ups operating in the technology (SaaS, telecom and hardware), life-science, consumer business and manufacturing industries. He has also served the region's largest investment company complexes (primarily private equity and venture capital), providing audit and advisory services to their funds and their portfolio of investments. Finally, Don is versed in numerous capital market transactions, whether IPO, SPAC, Reverse Merger or M&A, and experienced in managing their related accounting and financial reporting complexities.

In addition to his management and client service responsibilities, Don serves as an advisor and member to various industry and community boards, advises boards and executives on any matter of topics, including governance, risk and financial reporting and compliance, and is a faculty member of Deloitte's renowned Executive Transition Lab program where he works with board members and executives through complex career and leadership transitions.

Speaker

Public accounting technical update

Tuesday, December 2, 2025; 2:30 – 3:30 p.m. EST



Patrick Gilmore

Partner
Deloitte & Touche LLP

Patrick Gilmore is a Partner with Deloitte in its National Office where he specializes in matters pertaining to SEC rules and regulations related to financial reporting.

Patrick joined Deloitte in 2021 after 17 years on the staff of the SEC in the Division of Corporation Finance. Prior to joining Deloitte, from 2017 until his departure, Patrick served as the Deputy Chief Accountant in the Division of Corporation Finance's Office of the Chief Accountant at the SEC where he led the staff in providing technical accounting and reporting support for the Division's disclosure review program, led various rulemaking efforts, and answered interpretive questions and waiver requests related to the form and content of financial statements to be included in SEC filings. During 2020, Patrick also served as the Acting Disclosure Review Program Director where he oversaw the Division's selective review of transactional and periodic filings. Patrick spent the earlier part of his career with the SEC in various management and staff positions in the Division of Corporation Finance's Office of the Chief Accountant and the disclosure review program in the computer and software industry group.

Prior to joining the SEC, Patrick was an audit manager with PricewaterhouseCoopers. Patrick earned a Bachelor of Science degree from Towson University and is a Certified Public Accountant and a member of the AICPA.

Speaker

Public accounting technical update

Tuesday, December 2, 2025; 2:30 – 3:30 p.m. EST



Katy Rossino

Katy's primary areas of expertise are revenue recognition, compensation and benefits, and financial statement presentation. Prior to joining Deloitte's National Office, she spent two years as a Practice Fellow at the Financial Accounting Standards Board, and led standard-setting projects related to environmental credit programs, software, and financial KPIs. Katy has extensive experience serving clients in the life sciences, technology, and manufacturing industries in both an audit and advisory capacity.

**Partner, National Office
Accounting & Reporting
Services**

Deloitte & Touche LLP

Moderator

Driving M&A success: Insights for uncertain times

Tuesday, December 2, 2025; 4:00 – 5:00 PM EST



Adam Reilly

**National Managing Partner,
Mergers, Acquisitions, and
Restructuring Services**

Deloitte & Touche LLP

Adam is Managing Partner of Deloitte's US Mergers, Acquisitions, and Restructuring Services practice. In this role, he is responsible for the strategy and delivery of Deloitte's services to Corporate and Private Equity clients across each stage of the M&A and Performance Improvement/Restructuring lifecycle, collaborating with our clients to help them transform their businesses.

Adam is a partner with Deloitte & Touche LLP and has more than 25 years of experience with Deloitte, including more than 20 years dedicated to M&A. He has advised on transactions with over \$250 billion in value, including multi-billion dollar leveraged buyouts, growth acquisitions, strategic mergers, and complex carve-out transactions. His experience spans working with clients to help them maximize deal value through due diligence, deal structuring, operational and financial reporting, global integration, and divestiture activities.

Previously, he served as Deloitte's US Private Equity Leader, where he focused on delivering Deloitte's full suite of services to Private Equity firms and their portfolio companies. Adam is based in our San Francisco office and previously worked in Los Angeles and Bermuda.

Adam is a Certified Public Accountant (CPA) and holds a B.A. in Business Economics with an emphasis in Accounting from the University of California, Santa Barbara.

Speaker

Driving M&A success: Insights for uncertain times

Tuesday, December 2, 2025; 4:00 – 5:00 PM EST



Andrew Wright

**Private Equity M&A and
Advisory Leader**
Deloitte & Touche LLP

Working with Private Equity firms to achieve results with speed and confidence.

Andrew Wright leads Deloitte's Private Equity M&A and Advisory practice, where he advises leading private equity firms in both transaction execution and optimizing investments across the hold period. His leadership spans from strategic planning and due diligence to supporting in value creation priorities. Andrew has also been pivotal in developing Deloitte's M&A Analytics offering, enhancing the firm's capabilities in supporting client's data-driven decision-making.

A CPA by background, Andrew's career began in Deloitte's Audit business prior to transitioning to M&A Advisory in 2010. Since then, he has forged and led some of Deloitte's most significant Private Equity relationships. With deep technical specialization in deal execution, particularly carve-outs, Andrew expertly guides cross-functional teams through complex M&A transactions. His industry focus includes Technology, Media, and Telecommunications, where he leverages his extensive experience to optimize client outcomes and address sector-specific challenges.

Andrew is a member of the American Institute of Certified Public Accountants. He graduated from Linfield College in Oregon with a major in Accounting and a minor in Economics. He is a Certified Public Accountant licensed in both California and Oregon.

Speaker

Driving M&A success: Insights for uncertain times

Tuesday, December 2, 2025; 4:00 – 5:00 PM EST



Erik Dilger

Managing Director
Deloitte Financial Advisory
Services LLP

Erik Dilger is a Managing Director at Deloitte Advisory in Boston and plays a central role in leading and overseeing strategy & operations related initiatives for Deloitte's Risk and Financial Advisory business both in the United States and Globally. He leads multiple M&A related technology efforts including M&A products and M&A generative AI efforts. He is known for his ability to establish a vision, marshal the necessary resources, and execute operations to achieve results.

For over 23 years, Erik has provided consultative services related to knowledge management, audit, and forensic & dispute accounting services to clients. He has worked with the leadership of Deloitte to incorporate forensics into their audit approach and has been trained in tactical behavior assessment and strategic interviewing methods for purposes of eliciting information during forensic investigations. He has been a guest speaker at multiple Universities and professional associations, and has been an adjunct professor at Northeastern University since 2004 where he instructs multiple Fraud and Investigative Accounting classes. Erik is a member of the Association of Certified Fraud Examiners.

Erik is an alumni and now co-dean of Deloitte's prestigious Ellen P. Gabriel Fellowship Program, a firm-wide leadership development program offered to a select number of high-performing professionals. As part of this program he participated in a series of professional development workshops taught in conjunction with Columbia University and the Institute of the Future. His year-long fellowship culminated in a strategic project presentation focused on Social Media to the Deloitte executive committee.

He received his B.S. in Accounting from the University of Delaware and his education included minors in Economics and German. Erik is a past President (10 years) and Board Member of the German American Business Council of Boston (a 300 person non-profit organization) and is active in the community serving as the Deloitte United Way Chair and as a member of the National Ski Patrol for over 25 years. Currently, Erik serves on multiple boards and community organizations including the Duxbury Education Foundation, the Deutsches Altenheim, Pilgrim Church of Duxbury Council, Pilgrim Church of Duxbury Trustee Chairman, and youth soccer coach.

Speaker

Driving M&A success: Insights for uncertain times

Tuesday, December 2, 2025; 4:00 – 5:00 PM EST



Kate Asai

Partner
Deloitte Tax LLP

Kate is a tax partner in Deloitte's M&A Transaction Services practice based in Chicago. She has over fourteen years of experience at Deloitte and has spent the last nine years exclusively serving both financial and strategic M&A clients in a variety of industries.

Kate has advised clients in multiple areas of federal taxation, including due diligence and transaction structuring for complex buy-side and sell-side transactions. She is also deeply familiar with U.S. M&A tax considerations when investing in regulated utilities, U.S. solar, wind, storage, and other renewable energy projects, including tax credit due diligence, qualification, recapture, and monetization strategies involving tax equity and transferability.

Kate holds a Bachelor's in Accounting and a Master of Science in Accounting from James Madison University. She is a Certified Public Accountant in Illinois and Virginia.

Speaker

Driving M&A success: Insights for uncertain times

Tuesday, December 2, 2025; 4:00 – 5:00 PM EST



Will Braeutigam

Will is the US Capital Markets Transactions Leader at Deloitte. In this role, he leads the firm's efforts related to companies seeking public capital or debt. He has extensive venture capital and private equity experience. His team has served hundreds of companies completing capital market transactions. The team focuses on helping companies meet their strategic goals and objectives in a dynamic market and ever-changing regulatory environment.

Will also has several leadership roles including serving on the firm's mergers, acquisitions, and restructuring services executive committee and leading the firm's accounting advisory services offering.

**US Capital Markets
Transactions Leader**

Deloitte & Touche LLP

Moderator

The Quantum Race: Building Competitive Advantage Through Early Preparation

Wednesday, December 3, 2025; 11:30 – 12:30 PM EST



Kathy Scherer

Central Region Market Leader
Deloitte LLP

Kathy has more than 30 years of experience in delivering exceptional client service, complemented by the ability to develop, lead, and motivate large engagement teams to excel. As Deloitte's Central Market Leader, Kathy leads the marketplace efforts across 30 offices in the region. In addition, as Managing Partner of Deloitte's Chicago office, she oversees more than 5,800 local professionals and is responsible for driving the local practice strategy for growth, client service, talent, and community involvement.

Additionally, Kathy is a partner with Deloitte Tax LLP. She serves as Lead Client Service Partner and Advisory Tax Partner for a number of corporate clients. Previously, she led the Global Business Tax service line within Deloitte Touche Tohmatsu Limited.

Kathy is passionate about the advancement of women in the workplace, demonstrating her commitment through her leadership in Deloitte's Women's Initiative and the Chicago business community. She serves on the boards of Girl Scouts of Greater Chicago and Northwest Indiana, Junior Achievement of Chicago, World Business Chicago, and the Civic Committee of the Commercial Club of Chicago and is also a member of The Chicago Network. Kathy was recognized as one of Crain's Chicago Business "2019 Notable Women Executives Over 50" and received the "2017 Illinois CPA Society's Women to Watch Award" in the Experienced Leader category.

Speaker

The Quantum Race: Building Competitive Advantage Through Early Preparation

Wednesday, December 3, 2025; 11:30 – 12:30 PM EST



Dr. Mekena McGrew

**Quantum Information
Lead**

Deloitte Consulting LLP

Dr. Mekena McGrew is the Quantum Information Lead at Deloitte, specializing in applying quantum technology to business analytics. With a robust background in quantum computing research from Berkeley Lab and hands-on experience at HSBC, Dr. McGrew bridges cutting-edge research with practical applications. At HSBC, she developed the global quantum technology strategy, positioning the company as a top financial institution in quantum innovation. She also invented a quantum-inspired machine learning solution that significantly improved fraud detection.

Previously, Dr. McGrew was a Research Scientist at Lawrence Berkeley National Laboratory. She holds a Ph.D. in Physics from the University of California, Merced, has published 18 scientific papers on quantum technology, and speaks internationally on quantum advancements. Dr. McGrew's work translates complex quantum concepts into actionable business solutions, driving innovation and securing customer trust in the financial sector.

Speaker

The Quantum Race: Building Competitive Advantage Through Early Preparation

Wednesday, December 3, 2025; 11:30 – 12:30 PM EST



Natasha Buckley is a senior manager and research leader for Deloitte's Research & Insights organization. Her research focuses on the intersection of technology and societal trends with organizational culture, ethics and trust. At Deloitte, she leads multiple large research collaborations with academic institutions including MIT and the Fletcher School at Tufts.

Natasha Buckley

**Senior Research Leader,
Center for Integrated
Research**

Deloitte Services LP

Speaker

The Quantum Race: Building Competitive Advantage Through Early Preparation

Wednesday, December 3, 2025; 11:30 – 12:30 PM EST



Scott Buchholz

As a leader and visionary in new and emerging technologies, Scott Buchholz helps clients use technology to transform their organizations, missions, and businesses. He works across industries to provide actionable advice and insights to use technology to improve performance, effectiveness, and efficiency.

Scott serves as the national emerging tech research director for Deloitte Consulting. He also leads efforts in exploration of quantum computing and related technologies, working to solve customer challenges with these advanced technologies. In his role as CTO for Deloitte Consulting LLP's Government and Public Services practice, he works with government clients to use technology to innovate their operations, technology and mission delivery.

**National Emerging Tech
Research Director For
Deloitte Consulting
Government & Public
Services CTO
Deloitte Consulting LLP**

Moderator

The space economy: Preparing for the future

Wednesday, December 3, 2025; 1:00 – 2:00 PM EST



Alison Walgren

Central Texas Managing Principal
Deloitte Consulting LLP

Alison is a Principal in Deloitte's Strategy and Transactions practice, bringing more than 30 years of diverse consulting and technology expertise to her clients and teams. As the Central Texas Managing Principal, she leads a dynamic, multidisciplinary practice of over 2,500 professionals across Consulting Services, Audit and Assurance, and Tax, driving innovative solutions to the most complex challenges facing clients in the fast-growing Austin and San Antonio regions.

Throughout her career, Alison has specialized in advising, implementing, and supporting technology-driven transformations for organizations worldwide. Her industry experience spans consumer products, automotive, and financial services, with a proven track record of delivering results for clients both in the US and internationally.

Alison holds a bachelor's degree from Georgetown University and an MBA in International Business from the University of South Carolina.

Deeply committed to making a positive impact in her community, Alison serves on the boards of the United Way of Greater Austin, Opportunity Austin, the Better Business Bureau Foundation, the Korea Texas Forum, and Girls Inc. of San Antonio.

Speaker

The space economy: Preparing for the future

Wednesday, December 3, 2025; 1:00 – 2:00 PM EST



Brett Loubert

Brett Loubert is a Principal with Deloitte Consulting LLP and leads Deloitte's U.S. Space practice. With over 20 years of experience spanning national security and commercial space, he has guided multiple US-based and global organizations on Space commercialization, Earth observation, and next-generation infrastructure. Brett also oversees Deloitte's Space innovation portfolio, which includes Deloitte-1, the firm's first satellite, and Silent Shield, an on-orbit cyber defense payload.

Prior to Deloitte, Brett was an engineer and project manager for space systems at a large Defense contractor. Brett holds a Bachelor of Science in Electrical Engineering and a Master of Business Administration, both from the University of Maryland.

Principal, Deloitte Space

Deloitte Consulting LLP

Speaker

The space economy: Preparing for the future

Wednesday, December 3, 2025; 1:00 – 2:00 PM EST



Carey Miller

Managing Director

Deloitte & Touche LLP

Carey Miller is a managing director with Deloitte & Touche LLP, specializing in working with clients in the Huntsville geography to address cyber resilience, workforce transformation, IT modernization, and digital engineering. Carey is responsible for the expansion of Deloitte's Space practice, leading strategic initiatives and service deliveries for a diverse range of clients, including Space Force, NASA, state entities, educational institutions, and global clients. She has over 20 years of federal experience developing comprehensive cybersecurity strategies and capabilities, including those that address third party cyber risk and improve the resiliency of platforms, weapons systems, and ICS/SCADA systems. Carey is an advocate for increased STEM education and for promoting the next generation of cyber warriors. Carey is a past Federal 100 award winner and a recognized cyber industry luminary, driving both cyber innovation and workforce diversity.

Speaker

The space economy: Preparing for the future

Wednesday, December 3, 2025; 1:00 – 2:00 PM EST



Raquel Buscaino

**Deloitte's Novel &
Exponential Technologies
Leader**

Deloitte Consulting LLP

Raquel Buscaino leads Deloitte's Novel & Exponential Technologies (NExT) team where she and her team sense, and make sense of, emerging technologies that are likely to change the way we work and live. From brain-computer interfaces and synthetic biology to space exploration and quantum computing, Buscaino and her team aim to distill signal from noise, value from hype, and profitable actions from ambiguous concepts. The NExT team uses this research to create world-class thought leadership, such as Deloitte Tech Trends and xTech Futures publications.

Buscaino is also the host of the Deloitte TECHTalks podcast where she interviews industry leaders about what's new and next in tech. Prior to her leadership on Deloitte's NExT team, she worked in Deloitte's blockchain & digital assets practice where she specialized in blockchain consortiums and led global blockchain workshops for Deloitte and its clients.

Moderator

The tax policy landscape post the One Big Beautiful Bill Act

Wednesday, December 3, 2025; 2:30 – 3:30 PM EST



Evan Shea

Evan is the US Tax Legislative Marketplace Leader and National Tax Strategic Growth Offering Leader.

Evan is based in the firm's McLean, VA office and has more than 25 years of experience providing tax advisory and compliance services to a wide variety of multinational and publicly traded companies in energy, information technology, aerospace and defense, professional services and manufacturing/distribution industries.

Evan's experience includes corporate and partnership compliance and advisory services, UP-C structures, accounting for income taxes, income tax controls, accounting method changes, and tax department transformation assistance.

**US Tax Legislative
Marketplace Leader and
National Tax Strategic
Growth Offering Leader**

Deloitte Tax LLP

Speaker

The tax policy landscape post the One Big Beautiful Bill Act

Wednesday, December 3, 2025; 2:30 – 3:30 PM EST



Anna Taylor

**Deputy Managing
Principal, Tax Policy Group,
Washington National Tax**

Deloitte Tax LLP

Anna is the deputy managing principal of the Tax Policy Group within Washington National Tax.

Anna joined the Washington National Tax office in 2023 as deputy managing principal of the Tax Policy Group. She brings nearly two decades of Capitol Hill experience that will inform insights regarding tax and trade policy and legislative priorities and strategies. She joins a team that monitors US tax legislative and regulatory developments and produces articles for Deloitte Tax's weekly newsletter, Tax News & Views, and in-depth publications on issues such as the US deficit and US tax reform.

Anna joined Washington National Tax from the Office of the Senate Democratic Leader, where she was the Director of Economic Policy as well as Tax and Trade Counsel. During her time in this role, she was the principal tax negotiator on legislation such as the Coronavirus, Aid, Relief and Economic Security (CARES) Act, the American Rescue Plan Act of 2021, and the Inflation Reduction Act (IRA) of 2022. She developed, implemented, and managed the Senate Democratic Caucus economic policy agenda and acted as their primary floor advisor for tax, trade, financial services, retirement security and unemployment insurance legislation. She regularly interacted with the professional staff of the Joint Committee on Taxation, and minority and majority staff of the Senate Finance Committee and the House Committee on Ways and Means.

Anna earned her BA in political science from Arkansas State University and her JD from University of Arkansas School of Law.

Speaker

The tax policy landscape post the One Big Beautiful Bill Act

Wednesday, December 3, 2025; 2:30 – 3:30 PM EST



Jeff Kummer

Managing Director
Deloitte Tax LLP

Jeff specializes in US tax policy. He oversees a team of tax policy professionals who monitor US tax legislative and regulatory developments to develop articles for Deloitte Tax's weekly newsletter, Tax News & Views, and in-depth publications on issues such as the US deficit and US tax reform. He also provides insights on these same developments to tax leaders throughout the US. His Capitol Hill experience includes working on tax and budget issues for former US Senator and Senate Finance Committee member Steve Symms, R-Idaho.

Jeff is a frequent speaker at Deloitte-sponsored tax and industry events, as well as events sponsored by industry groups such as Tax Executive Institute, American Petroleum Institute, and Financial Executives International.

Jeff holds a BS in political science from University of Idaho and an MBA from Johns Hopkins University.

Moderator

AI transformation in finance, accounting, and controls for private companies

Wednesday, December 3, 2025; 4:00 – 5:00 PM EST



Geoffrey Kovesdy

Audit and Assurance Principal

Deloitte & Touche LLP

Geoff has over 20 years of experience, where he focuses on collaborating with his clients to develop bespoke solutions for their strategic opportunities & initiatives. This includes, but is not limited to risk management, digital transformations, process reengineering, business process outsourcing/insourcing, and ERP implementations. His experience involves leading client relationships through Internal Audit, Finance & Accounting, Compliance, Cyber Security, and Risk Management and he currently leads our Digital Controls, AI, & Automation Market Offering.

His specialization is risk management, where he spends a significant amount of time assisting his clients in modernizing and transforming risk management activities across the 3 Lines by utilizing digital / AI capabilities and innovative ways of working. This includes strategy development and implementation, facilitating lab sessions and training, and identifying and developing digital use cases and assets.

Geoff has led IA, SOX and compliance activities for multiple Fortune 500 companies and has managed operational, regulatory compliance, strategic, financial, and IT IAs domestically and globally, as well as assisted with implementing enterprise risk management frameworks and conducting internal audit risk assessments.

In addition, throughout Geoff's time with Deloitte, he has helped to incubate and bring several new products, technology assets, and services to market and is a recognized speaker at several industry and domain conferences on the topics of Risk Management, Digital Risk Management, AI, Analytics, and automation, and Risk Excellence (Coordinated Assurance).

Speaker

AI transformation in finance, accounting, and controls for private companies

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Geoffrey Kovesdy

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Moderator

Navigating transformation: Tax policy, tariffs, and technology

Thursday, December 4, 2025; 1:00 – 2:00 PM EST



Dave Yaros

Principal
Deloitte Tax LLP

David is a Tax principal in the Chicago office of Deloitte Tax LLP and leads Deloitte Tax's US Indirect Tax practice which is part of the Enterprise Services offering portfolio. In leading the Indirect Tax practice, he oversees Sales & Use, Property Tax, Unclaimed Property, Reverse Audit, Excise Tax, Severance Tax, Gross Receipts Tax, Premiums Tax, Value Added Tax, and Global Trade Advisory practices. Additionally, he leads the Tariffs Integrated Offering, wherein he works cross-functionally across Deloitte to help clients chart the right course amidst new and proposed tariffs in a dynamic and fast pace global trade and supply chain.

Dave has more than 25 years of diverse consulting and leadership experience in federal and state tax planning across various industries, including energy, financial services, TMT, manufacturing, and GPS. Most recently, Dave has focused on a variety of indirect tax issues and the intersection of technology and tax technical to solve our clients' biggest challenges and specializes in performing large-scale indirect tax refund studies and he previously led the Reverse Audit practice. Dave also previously co-led the sustainability strategic growth offering for the tax function and leverages his engineering experience to identify how our client's sustainability objectives intersect with tax matters. Dave has a Bachelor of Science and Master of Science in Environmental Engineering from Michigan State University and is an Enrolled Agent.

Speaker

Navigating transformation: Tax policy, tariffs, and technology

Thursday, December 4, 2025; 1:00 – 2:00 PM EST



Gabe Kitamura

Gabe is a Senior Manager with Deloitte Tax LLP's US Global Trade Advisory practice. He has assisted companies with various aspects related to both import and export compliance requirements for the US and other jurisdictions. Gabe's experience with the regulatory perspective of import and export compliance informs his role on ERP implementation projects. His specialty is leveraging client and regulatory data to achieve business insights, strategic decisioning, and operational efficiencies. Gabe's import, export, and automation experience has been with clients of various size and trade profiles. These clients have primarily been in the consumer goods, automotive, chemical, industrial manufacturing, and high technology industries. Gabe is a Licensed US Customs Broker and a Certified US Export Control Officer (CUSECO).

Senior Manager

Deloitte Tax LLP

Speaker

Navigating transformation: Tax policy, tariffs, and technology

Thursday, December 4, 2025; 1:00 – 2:00 PM EST



Helen Cousineau

Helen is a Deloitte Tax LLP managing director within Deloitte's Global Trade Advisory group. Helen serves multinational clients globally and leads the group's import service offerings, including matters involving the link between transfer pricing and related-party Customs valuation. Helen also serves as the Global Indirect Tax Quality and Risk partner on Deloitte's Global Indirect Tax Executive Committee. Before joining Deloitte Tax in 2002, Helen worked at Arthur Andersen LLP, where she was also involved in advising clients on a variety of matters involving global import and export issues. Prior to joining Andersen, she practiced law in Washington D.C. and New York, focusing on legal matters involving customs and international trade law, international transportation law, and suretyship law.

Managing Director

Deloitte Tax LLP

Speaker

Navigating transformation: Tax policy, tariffs, and technology

Thursday, December 4, 2025; 1:00 – 2:00 PM EST



Jivan Datta

Principal

Deloitte Tax LLP

Jivan is a principal in Deloitte's US International Tax practice and is the Global leader of the Value Chain Alignment group. He has more than 20 years of experience practicing in international tax. Jivan received a Bachelor of Arts degree from the University of Rochester, Juris Doctor from American University's Washington College of Law, and the Master of Laws in taxation from the University of Miami. Jivan specializes in value chain alignment planning with a focus on consumer products, life sciences, as well as other industries. He has led multidisciplinary teams designing and implementing supply chains models in Asia, Europe, and Latin America. Clients served to include the US and non-US based multinational companies. Jivan is a frequent speaker on supply chain planning including external seminars such as the National American Institute of Certified Public Accountants (AICPA) conference. He is a member of the Maryland Bar Association.

Moderator

Private company capital markets outlook: Navigating exit strategies and M&A opportunities

Thursday, December 4, 2025; 2:30 – 3:30 PM EST



Kevan Flanigan

Based in Los Angeles, Kevan leads the Deloitte Private practice for Risk & Financial Advisory and serves as Private Equity Leader for Deloitte Private. He also advises Private Equity and Technology & Media clients around industrial technology and adjacent investment themes.

Kevan has more than 25 years of investment banking and financial advisory experience, assisting public and private entities throughout the acquisition, capital raising and sale or divestiture process. Kevan has led multi-functional teams in completing cross border transactions in Brazil, Canada, the Caribbean, China, EMEA, Japan, Mexico and the United Kingdom.

**Private Equity Leader,
Deloitte Private**

**Deloitte Transactions &
Business Analytics LLP**

Speaker

Private company capital markets outlook: Navigating exit strategies and M&A opportunities

Thursday, December 4, 2025; 2:30 – 3:30 PM EST



Jess Williams

Jess is a Tax Partner in Deloitte's M&A Transaction Services group. She has experience advising private equity and strategic clients in buy-side and sell-side M&A transactions, including assisting with tax due diligence and tax structuring. She has worked on transactions in a variety of industries, including consumer products, health care, technology, manufacturing, and utilities, and has experience serving US-based and non-US based clients in cross-border transactions.

Partner

Deloitte Tax LLP

Speaker

Private company capital markets outlook: Navigating exit strategies and M&A opportunities

Thursday, December 4, 2025; 2:30 – 3:30 PM EST



Micaela Saviano

Partner

Deloitte Tax LLP

Micaela Saviano is a Partner with Deloitte Tax LLP. Her clients include family offices, ultra-high net worth individuals, and closely-held businesses. She specializes in structuring family offices and investment partnerships, supporting clients through liquidity events, and estate planning and post-mortem administration.

Micaela also leads the Art & Finance group for Deloitte Tax. In this role she helps clients plan for and manage their fine art collections and identifies tax, audit, advisory, and consulting solutions for businesses in the art industry.

Micaela is a certified public accountant (CPA) licensed in Illinois. She is a member of the American Institute of Certified Public Accountants, Illinois CPA Society, and the Chicago Estate Planning Council.

Speaker

Private company capital markets outlook: Navigating exit strategies and M&A opportunities

Thursday, December 4, 2025; 2:30 – 3:30 PM EST



Will Braeutigam

Will is the US Capital Markets Transactions Leader at Deloitte. In this role, he leads the firm's efforts related to companies seeking public capital or debt. He has extensive venture capital and private equity experience. His team has served hundreds of companies completing capital market transactions. The team focuses on helping companies meet their strategic goals and objectives in a dynamic market and ever-changing regulatory environment.

Will also has several leadership roles including serving on the firm's mergers, acquisitions, and restructuring services executive committee and leading the firm's accounting advisory services offering.

**US Capital Markets
Transactions Leader**
Deloitte & Touche LLP

Speaker

Private company capital markets outlook: Navigating exit strategies and M&A opportunities

Thursday, December 4, 2025; 2:30 – 3:30 PM EST



Will Frame

Will is the CEO of Deloitte Corporate Finance LLC (DCF) in the US and also leads DCF's Industrials Group and sits on DCF's Global Executive Committee. Will joined DCF in 2000 when he moved from Deloitte UK. Now based in Chicago, Will has worked professionally in the US, Europe, Latin America, and Asia and specializes in advising privately held businesses on their M&A and financing transactions.

Will has been a managing director with DCF in the US since October 2000. Prior to that he was an assistant director in Deloitte UK's corporate finance division.

CEO

Deloitte Corporate Finance LLC

Moderator

AI in action: How agentic AI is transforming enterprise decision-making

Thursday, December 4, 2025; 4:00 – 5:00 PM EST



Dan Kinsella

Partner
Deloitte & Touche LLP

Dan is a recognized leader in infrastructure strategy, risk management, and alliance development, with over 20 years of experience driving innovation and growth at Deloitte and in the public sector. As US Infrastructure Alliance Leader and State, Local, and Higher Education Infrastructure Leader, he forges executive partnerships and advises on modernization initiatives that deliver sustained value. Dan has led national teams, overseen multimillion-dollar projects, and provided governance and assurance solutions for Fortune 500 clients. As Omaha Office Managing Partner, he champions client satisfaction, community engagement, and operational excellence.

Dan and his wife Kari have four children and live on an acreage, where they garden and harvest fruit trees. Together they enjoy spending time outdoors camping, hiking, and boating, as well as going to the theatre, symphony and concerts. Daniel credits his professional and personal life balance to variety and versatility.

Speaker

AI in action: How agentic AI is transforming enterprise decision-making

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Chris is a leader in Deloitte Consulting's Enterprise Performance Portfolio where Deloitte brings together strategic thinking with technological acumen to solve some of their client's most challenging problems.

With over 20 years in the transformation program field, Chris brings a wealth of knowledge and practice experience and is frequently sought out for his unique perspectives on delivering real value from transformation programs.

Chris Verheuvel

Managing Director

Deloitte Consulting LLP

Deloitte.

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