

UConn
Finance
Society

9th Annual Finance Conference





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Conference Overview



Conference History

The Finance Conference at the University of Connecticut has a rich history of bringing together students, professionals, and industry experts to explore key trends and challenges in the finance sector. Since its inception, the conference has served as a platform for insightful discussions, thought-provoking panels, and invaluable networking opportunities. Each year, the conference offers attendees the chance to gain fresh perspectives and knowledge from leaders in the field. As the conference enters its 9th year, we remain committed to delivering an exceptional experience that inspires, educates, and connects the finance community.

Past Panelist Profiles





Outline of the Day

- *11:00 - 11:30 AM – Doors Open*
- *11:30 AM - 12:00 PM – Welcome Speakers*
- *12:00 - 12:45 PM – Trends in Public Equities: Where Markets are Headed Next*
- *12:45 - 1:30 PM – Dealmaking in Turbulent Times: M&A Strategies for Uncertain Markets*
- *1:30 - 2:40 PM – Finance Society Alumni Lunch*
- *2:40 - 3:15 PM – The Rise of Private Credit: Opportunities in an Evolving Debt Market*
- *3:15 - 4:00 PM – The Business of Building Businesses: Inside Today's Private Equity*
- *4:00 - 4:30 PM – Networking Session*
- *4:30 - 5:00 PM – Closing Remarks*



Finance Society Alumni Lunch

The Finance Society is excited to introduce the Finance Society Alumni Lunch, a unique opportunity for current students and UConn alumni to connect, share experiences, and build professional relationships.

Whether you are looking to learn more about specific roles, gain industry-specific advice, or simply expand your professional network, this lunch offers the perfect setting to do so. The alumni attending represent a diverse group of companies and careers from investment banking, corporate finance, asset management, and consulting.

We will be Joined By Alumni From





Keynote Speaker



Daniel Toscano - *Keynote Speaker*

Morgan Stanley, *Managing Director*

Daniel Toscano is a Managing Director at Morgan Stanley, where he has spent nearly 15 years in leadership roles within the firm's New York office. With a strong foundation in finance, he brings deep experience in capital markets and strategic advisory.

Toscano holds an MBA from the Wharton School and a BS in Finance from the University of Connecticut. He continues to stay engaged with the University of Connecticut as a member of the Board of Trustees since 2019.

Trends in Public Equities



Sheldon Kasowitz - *Equity Panelist*

Indus Capital Partners, *Co-Founder & Non-Executive Chairmen*

Sheldon Kasowitz is the founder and Non-Executive Chairman of Indus Capital Partners, a hedge fund focused on mispriced large-cap Asian equities. Since founding Indus in 2000, he has shaped its investment strategy and built a reputation for deep regional expertise and rigorous analysis, managing billions in assets. He also manages the Indus PacificChoice Asia UCITS fund, blending macro insights with bottom-up research to identify inflection points across Asian markets.

Previously, Kasowitz was a Principal at Soros Fund Management, gaining key experience in global macro investing. He began his career in research and trading roles and is known for his disciplined investment approach and understanding of cross-border capital flows. He holds an MBA from Columbia and a bachelor's from the University of Connecticut.

Colin McCarroll – *Equity Panel Moderator*

UConn Class of 2025, Bachelor of Science in Business, Finance



Dealmaking in Turbulent Times



Justin Montellese – *M&A Panelist*

Hologic, Senior Director, Corporate Business Development

Justin Montellese is the Senior Director of Corporate Business Development (M&A) at Hologic, leading healthcare-focused acquisitions. Previously, he was Senior Director of Strategic Initiatives at CareCentrix, managing M&A and strategic investments. He worked at Piper Jaffray and Citizens Capital Markets as an Investment Banking Associate, specializing in M&A execution. With a strong background in investment banking and corporate finance, he has expertise in financial modeling, deal structuring, and transaction strategy. Montellese holds a B.A. in Economics and Finance from the University of Connecticut.



Jonathan Jenson – *M&A Panelist*

RBC, Director, Mergers & Acquisitions

Jonathan Jenson, CFA, is a Director of Mergers & Acquisitions at RBC Capital Markets, where he advises on complex transactions and strategic initiatives. He previously held senior roles at KPMG, where he led valuation and deal advisory projects, and at Industrial Development Funding and Imperial Capital, where he focused on capital raising and restructuring for middle-market clients. With deep experience across corporate finance and investment banking, he brings a strong track record in executing strategic transactions. Jonathan holds an M.Fin. from MIT Sloan, with cross-registration at Harvard Business School, and graduated first in his class from the University of Connecticut.

Gianna Draghi – *M&A Panel Moderator*

UConn Class of 2026, Bachelor of Science in Finance



The Rise of Private Credit



James Roche – *Credit Panelist*

Willow Tree Credit Partners, *Chief Credit Officer*

James Roche is the Chief Credit Officer at Willow Tree with 30 years of experience in leveraged finance. He was a Managing Director at GSO, Blackstone's credit arm, leading private origination for FS Investment Corp. as it grew to \$17.2 billion AUM. He also held senior roles at Blackstone/GSO, RBC, Fitch Ratings, Nations Credit, and MetLife Capital. Roche holds a B.A. in Economics from the University of Connecticut.



Brian Laureano – *Credit Panelist*

FoxPath Capital, *Partner & Chief Investment Officer*

Brian Laureano, CFA, is a Partner and Chief Investment Officer at FoxPath Capital Partners, specializing in credit secondaries. He founded Apollo's credit secondary strategy and was an Investment Principal in its Corporate Credit business. He previously worked in investment banking at Wells Fargo and RBS. Brian holds a B.S. in Finance from the University of Connecticut and is a CFA Charterholder.



Andrew Passero – *Credit Panelist*

Churchill Asset Management, *Principal*

Andrew Passero is a Principal at Churchill, focused on sourcing deals and building relationships with East Coast private equity sponsors. Previously, he was a Vice President in J.P. Morgan's Private Bank, specializing in portfolio analytics, and a Quantitative Portfolio Analyst at K2 Advisors. He holds a B.S. in Finance with minors in Economics and Information Systems from the University of Connecticut and is a CFA Charterholder.

Stella Daniel – *Credit Panel Moderator*

UConn Class of 2026, Bachelor of Science in Mechanical Engineering



The Business of Building Businesses



Patrick Donegan – *Private Equity Panelist*
Blue Ridge Partners, *Senior Managing Director*

Patrick Donegan is a Senior Managing Director at Blue Ridge Partners, specializing in driving growth and operational improvements for private equity-backed companies. Previously, he was an Operating Partner at The Riverside Company, where he worked with deal and portfolio management teams to address growth challenges, implement capital-efficient strategies, and scale businesses predictably within target hold periods. He has also held leadership roles with full P&L responsibility at PIP and GLG, as well as key positions at Mastercard, LRN, and Gartner. With deep expertise in private equity operations and strategic growth execution, Patrick has a track record of helping companies scale efficiently and achieve sustainable growth. He holds an MBA from the University of Connecticut and a B.S. in Mechanical Engineering from Northeastern University.



Leaf Gross – *Private Equity Panelist*
Aviditi Advisors, *Partner and Co-Head, Capital Solutions*

Leaf Gross is a Managing Director in the Piper Sandler Private Capital Advisory group, specializing in capital solutions and financial structuring. Previously, he was a Partner and Head of Capital Solutions at Aviditi Advisors, leading debt and equity transactions for portfolio companies and third-party clients. He also served as a Director at KKR in the Capital Markets group, where he sourced and executed financing transactions. Gross was a Vice President in Morgan Stanley's Investment Banking division and held roles in global markets at Citigroup and Cambridge Associates, where he conducted private equity and venture capital research. Gross holds an MBA from the University of Michigan and a B.A. in Political Science from the University of Connecticut.

Alexander Cameron – *Private Equity Moderator*
UConn Class of 2026, Bachelor of Science in Mathematics and Statistics



The Finance Society



About Us

The Finance Society is one of the largest student-run organizations at the University of Connecticut. Since its inception in 2003, the organization has been at the forefront of assisting in the professional, educational, and social development of students interested in finance.

Offerings

Members engage in current event discussions, mentorship programs, company presentations, networking events, stock pitch competitions, conferences, and career development workshops to enhance hard and soft skills.

Placement

Alumni of the Finance Society have launched successful careers at prestigious firms such as Goldman Sachs, Bank of America, Citi, Moody's, Morgan Stanley, UBS, Houlihan Lokey, and BNP Paribas.



The Finance Society

Executive Board



Matthew Aristy
President



Max Skidmore
Vice President



Ayden Gauthier
Treasurer



Alexander Cameron
Conference Director



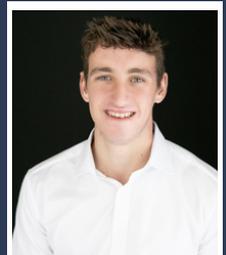
Stella Daniel
VP of Marketing



Dovidas Kizevicius
VP of Member Relations



Gianna Draghi
VP of Programming



Colin McCarroll
Director of Current Events



Travis Roux
Programming



James Bermeo
Programming



Ethan Dugdale
Current Events



Raj Reddy
Current Events



A Special Thank You

We extend our heartfelt gratitude to our esteemed speakers & panelists, whose insights enriched our conference discussions. A special thank you to Chris Walker and Morgan Stanley for hosting us, and to Finance Society Conference Director Alex Cameron for his dedication and hard work in organizing this event.

We also appreciate the support and guidance of our faculty members, whose mentorship is invaluable. Last but not least, we thank all the attendees and guests for their participation and contribution, making this conference a success.

– UConn Finance Society