



EPI NEW JERSEY CHAPTER | 2026

MEMBER DIRECTORY

Meet Our Community of Advisors
and Chapter Leaders



Exit
Planning
Institute.

Letter From Our President

GERRY SPITZER

Dear CEPA Colleagues and Fellow Exit Planning Professionals,

Welcome to the latest edition of the New Jersey EPI Chapter Member Directory. This directory is more than just a listing of names and contact information—it's a reflection of the dynamic, committed, and collaborative community we've built together. As our chapter continues to grow, this tool becomes increasingly valuable for fostering meaningful connections, deepening professional relationships, and creating new opportunities for collaboration.

Whether you're seeking to refer a trusted advisor, build your team of value creation professionals, or simply get to know your fellow members better, I encourage you to use this directory as a bridge. Behind every name is a story, a specialty, and a desire to support business owners in building, growing, and eventually exiting with success and purpose.

The New Jersey Exit Planning Institute chapter is here to help you make the most of your CEPA designation, empower you to serve your clients as their most valuable advisor as you help your clients move from success to significance. Reach out to me or any of our board member leaders if you need support to help you succeed in maximizing your CEPA designation.



Gerry Spitzer

Founding Partner, Questar Capital Partners

BOARD MEMBERS

Chapter President



Gerry Spitzer, CPA, CPWA, CEPA, CRPC

Questar Capital Partners, Founding Partner

[Email](#) | [LinkedIn](#)

Gerry Spitzer is a nationally recognized expert in Employee Stock Ownership Plans (ESOPs) and exit planning for privately held business owners. As co-founder of Questar Capital Partners, Gerry leads a team that specializes in helping founders and leadership teams design tax-efficient exit strategies, often through ESOP transactions that preserve legacy, reward employees, and optimize value.

Board Member



Ashley Sarokhan

Lazear Capital Partners, Managing Director

[Email](#) | [LinkedIn](#)

Ashley is a Managing Director at Lazear, where she leads sell-side ESOP engagements in the New Jersey/New York region and extends her expertise to business owners nationwide. She helps clients navigate complex ownership transitions, creating innovative solutions that maximize value for owners, employees, and the business. Known for her creativity and client advocacy, Ashley inspires business owners to consider new perspectives and approaches, which has fueled her focus on ESOPs.

Board Member



Margot DeKorte Lewis

Bressler, Amery, & Ross, Associate

[Email](#) | [LinkedIn](#)

Margot DeKorte Lewis is an associate in the firm's Private Client group in Bressler's New Jersey office. She focuses her practice primarily on estate planning and administration.

BOARD MEMBERS



Board Member

Mark Kossow

Clark Hill, Member

[Email](#) [LinkedIn](#)

Mark R. Kossow advises corporate, banking, and financial services clients on employee stock ownership plans (ESOPs).

He represents clients in ESOP transactions consisting of stock purchases, buyouts, and mergers and acquisitions. He supports individual and institutional trustees, directors, shareholders, banks, and private and public companies on a variety of ESOP-related matters, both transactional and non-transactional.



Board Member

Bill Castellano, Ph.D

Rutgers Institute for the Study of Employee Ownership & Profit Sharing, Associate Director

[Email](#) [LinkedIn](#)

Dr. Bill Castellano is Professor of Strategic HR Management at Rutgers University School of Management and Labor Relations and is the Director of the Institute for the Study of Employee Ownership and Profit Sharing. He also serves as a board member of the Global Equity Organization and Exit Planning Institute. His research, teaching, and consulting activities are focused on understanding the impact of employee ownership and equity compensation strategies on individual and organizational outcomes, employee engagement, and the strategic management of human capital.



Board Member

Kevin Pearly, CFP, CRPC, C(k)P

SkyPath Private Wealth, Founding Partner

[Email](#) [LinkedIn](#)

Kevin co-founded SkyPath Private Wealth in 2022, following a career that spanned more than 22 years with Merrill Lynch Wealth Management. Kevin's passion for advising and guiding clients with the best possible service, tools and technology led him to found his own independent firm with a team of likeminded, experienced wealth advisors.

BOARD MEMBERS



Board Member

Bill Shumacher

M&T Bank, SVP

[Email](#) [LinkedIn](#)

Bill is a highly experienced, motivated, resourceful, creative, customer-service oriented financial services executive with a unique range of skills in relationship management, business development, commercial finance and asset management skills. He specializes in commercial banking and business development, with a unique background in work out and restructuring troubled credits.



Board Member

John Vitucci

PKF O'Connor Davies, Partner, Employee Benefit Services

[Email](#) [LinkedIn](#)

John N. Vitucci is the ESOP Practice Leader at the Firm. John has more than 30 years of experience working with Fortune 500 corporations, private business and investment banks in all areas of employee benefits, executive compensation and ERISA. John is currently an adjunct professor at Columbia University where he teaches Pensions & ERISA and Oral Communications for Actuaries in the Actuarial Masters Program.



Board Member

Jeffrey Kates

Next is Now Consulting, Founder & President

[Email](#) [LinkedIn](#)

Jeffrey is the founder and president of Next is Now Consulting, a business advisory services firm specializing in fractional CFO, business transition planning, value acceleration, M&A advisory, turnarounds, and forensic accounting.

Jeffrey brings 35 years of accounting, financial reporting, operations, process improvement, and M&A experience in a multitude of industries and corporate environments. His strong professional intuition and business acumen combined with his interpersonal and communication skills allow him to integrate and interact with management and stakeholders and immediately add significant value to the business.

CHAPTER MEMBERS



Use the information below to connect and collaborate with local industry experts in the New Jersey area.
List organized by Advisor Type.

Wealth Managers / Financial Advisors



Neil McPeak

McPeak Wealth Management, Managing Partner

[Email](#) | [LinkedIn](#)

Neil McPeak, Jr. joined the McPeak Wealth Management Group of Wells Fargo Advisors in 2010 with a B.S. in Economics and concentration in finance from the Wharton School of the University of Pennsylvania. Working with both individuals and institutions, Neil is responsible for analyzing complex financial situations and providing custom tailored investment solutions to fit clients' needs. In March 2013, Neil became a CERTIFIED FINANCIAL PLANNER™ practitioner. Prior to joining the McPeak Wealth Management Group, Neil trained with the U.S. Rowing National Team at the Olympic Training Center in Chula Vista, CA. Neil lives in Linwood, NJ, is an avid supporter of Penn Rowing, serves on the board of St. Augustine Prep and the board of trustees of Cancer Support Community New Jersey at Gilda's Club.



Braezen Subick

Northeast Private Client Group, Title

[Email](#) | [LinkedIn](#)

As a Northeast Private Client Group financial advisor, I enjoy the opportunity to partner with individual investors on creating and implementing strategies that work toward specific goals that we set together. Whether it's planning for retirement, saving for college for children or grandchildren or just trying to help protect the financial future of the ones that we care the most for, we take the time to identify each goal and develop the strategy to address it. I also coordinate and work in tandem with other professionals who include CPAs, Estate Planning Attorneys and Life Insurance Specialists and Agents to execute needed actions.



Michael Holden

Merrill, Managing Director

[Email](#) | [LinkedIn](#)

Michael Holden is a Managing Director and Wealth Management Advisor in Red Bank, New Jersey. He began his career in 2007 and joined Merrill in 2010. Over the course of his career, he spent several years in Merrill's Private Wealth Management Group and later formed CH Wealth Management Group in 2018



Giro "Jerry" Maddaluna

Luna Financial Group, Founder

[Email](#) | [LinkedIn](#)

Michael Holden is a Managing Director and Wealth Management Advisor in Red Bank, New Jersey. He began his career in 2007 and joined Merrill in 2010. Over the course of his career, he spent several years in Merrill's Private Wealth Management Group and later formed CH Wealth Management Group in 2018

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Wealth Managers / Financial Advisors



Matthew Beaulieu

Morgan Stanley, Executive Director

[Email](#) | [LinkedIn](#)

Matt has 29 years of industry experience primarily with UBS Financial Services and predecessor firm PaineWebber. He spent the bulk of that time field leadership or field facing rolls. From 2015 until 2023 he was a Branch Manager in UBS's Flagship Office in NYC, responsible for 70 Financial Advisors and \$20 billion in assets. Prior to that he was the COO of Private Wealth Management and separately, the Eastern Division, covering the eastern half of the US.



Ty Robinson

Edward Jones, Financial Advisor

[Email](#) | [LinkedIn](#)

We focus on serving Executives, Corporate Leadership, and Business owners with long-term complex estate strategies. Our goal is to understand what's important to the individual clients, business owners, & communities we serve in order to improve their lives. Using financial planning strategies while partnering with your other trusted advisors: i.e. CPA, Attorney, Business banker, and Family consultant, we will produce the most successful outcomes over time.



Matthew Daly

Edward Jones, Financial Advisor

[Email](#) | [LinkedIn](#)

I am an experienced financial professional with over 20 years in the institutional investment world. As an Edward Jones financial advisor, I create a collaborative environment with our clients to generate successful long-term relationships. My experience in the financial markets allows me to develop effective individual solutions for a wide range of situations. We focus on growing your assets, guiding your retirement process, education funding and protecting your assets for future generations.



D. Jeremy Pugliese

Edward Jones, Financial Advisor

[Email](#) | [LinkedIn](#)

D. Jeremy Pugliese is a Financial Advisor with Planning Alliance. Jeremy assists business owners in designing and implementing optimal financial plans. His areas of experience are business continuity planning, partnership negotiations, business exit planning, and employee retention plans. He and his team are dedicated to ensuring clients experience the highest level of service based on a foundation of integrity, and follow-through.

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Wealth Managers / Financial Advisors



Michael Dietrich

UBS, Financial Advisor

[Email](#) | [LinkedIn](#)

With over 20 years of experience, I built my practice helping clients with their financial planning and investment needs. During my career, I have witnessed both the private and institutional sides of the financial industry, enabling me to bring valuable market insights to my practice. Additionally, this experience helps me to have a strong understanding of the firm and how to use the resources to benefit my clients. I have formalized my experience by completing the rigorous certification process and achieving the designation of Certified Financial Planner®



Joseph Bonadeo

Edward Jones, Financial Advisor

[Email](#) | [LinkedIn](#)

As a financial advisor for over 30 years, I have had the privilege of partnering with clients as far away as Hawaii and as near as my office in Succasunna (Roxbury) in Morris County, New Jersey. It has been my professional goal to uniquely design each of my clients' portfolios throughout my career.

My clients seek preparation for their retirement, are recently retired or have had a 401(k) in the past. Major life events such as an inheritance, divorce, death of a loved one or long-term care protection are areas that I help my investors navigate as their financial advisor. Additionally work with business owners utilizing the CEPA® designation tailored for business owners unique needs.



John Kelly

UBS, Wealth Manager

[Email](#) | [LinkedIn](#)

I have spent my entire career in the Financial Services Industry. For over 30 years, I have focused on working with institutions and individuals, committed to tailoring solutions to meet their financial goals. I pride myself on my long term client relationships, which has been helpful in guiding them through volatile markets. I provide first class service to my client base that includes credit unions, not-for-profits, associations, corporations and high net worth individuals and their families.



John Martin

Morgan Stanley, Financial Advisor

[Email](#) | [LinkedIn](#)

John Martin is a Vice President and Financial Advisor with Morgan Stanley Wealth Management. He serves individuals, private companies and family businesses in the pursuit of reaching their personal and business financial goals. He holds an MBA degree in Finance from St. John's University's Peter J. Tobin College of Business and has been in the financial services industry helping individuals and businesses develop comprehensive solutions around business strategy, succession planning, governance, wealth management and philanthropy since 1992.

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CPA / Accountant



John McIntyre

Gearty & McIntyre LLP, CPA

[Email](#) | [LinkedIn](#)

Gearty & McIntyre, LLP, CPA, was established in 1981. In the 42 years of dedicated service, the firm has developed a reputation for specializing in business advisory services, litigation support and forensic accounting.



Leo Parmegiani

GPKF O'Connor Davies, LLP, CPA

[Email](#) | [LinkedIn](#)

Leo Parmegiani has over 30 years of experience in public accounting. He has considerable expertise in a broad range of tax specialty areas, including the **hospitality** and **real estate** industries, both domestic and international business investments, sales and use tax, C Corporations, S Corporations, Partnerships, LLCs and REITs, and state and local tax issues.

Business Coach



Matthew Wizeman

Focal Point Exit Strategies, Business Coach

[Email](#) | [LinkedIn](#)

Matt Wizeman is a Certified FocalPoint Business Coach who primarily specializes in working with small manufacturing businesses with annual gross revenues of \$1M to \$30M. With a talent for working with clients and their leadership teams, Matt identifies fundamental challenges and guides the delivery of strategic solutions to attain exceptional results.



Jim Neidhardt

Exceptional Biz, Business Coach

[Email](#) | [LinkedIn](#)

I am the trusted advisor that helps CEOs, Presidents, and Business owners of small and mid-size businesses capitalize on the collective intelligence of their peer advisors and leadership team to make them the best leader they can be that will improve their business, their lives and the lives of their numerous employees.

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Wealth Managers / Financial Advisors



Tyree Floyd

JP Morgan, Financial Advisor

[Email](#) | [LinkedIn](#)

Tyree is an accomplished financial professional with 20 years of sales and client service experience at Fortune 500 companies.



Dennis R Huergo

Wealth Enhancement, Financial Advisor

[Email](#) | [LinkedIn](#)

Dennis is dedicated to personal financial planning and an expert at aligning financial concepts with the specific goals of his clients. He excels at simplifying intricate ideas and enabling individuals to confidently steer their financial decisions with clarity and trust. Previously at Altfest Personal Wealth Management and Facet Wealth, he planned strategies for high-net-worth clients. With a background in New York Life's consulting team and military service, he brings a wealth of experience. Currently pursuing a graduate degree in Personal Financial Planning at Texas Tech University, he is committed to professional growth. Outside of work, Dennis serves on the Board of Directors of the Financial Planning Association of New Jersey and enjoys reading, running, and spending time with his family.

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ESOP



Chris Coates

SES ESOP Solution, Senior Vice President

[Email](#) | [LinkedIn](#)

Chris advises companies, owners and other stakeholders on business transition strategies, with a particular focus on ESOP ownership transactions. He has extensive deal shaping, negotiation and operational management experience that provide him unique perspective on the opportunities and challenges of companies seeking to implement employee ownership.

M&A Advisor



Madhur Duggar

Excendio Advisors, Senior Advisor

[Email](#) | [LinkedIn](#)

I work with owners of middle market IT and software businesses to help them realize their business valuation goals through the M&A process.

Business Advisor



Doreen Binkiewicz

DGL Business Solutions, CFO

[Email](#) | [LinkedIn](#)

Doreen is the President of DGL Business Solutions Inc., a bookkeeping and business advisory firm that supports small and mid-sized businesses with dependable, confidential financial services. With a background in finance and 12 years of experience in Standard & Poor's Debt Rating Services Division, Doreen founded DGL Business Solutions in 2002. She helps business owners maintain accurate, timely financial information and understand their numbers so they can make clear decisions, improve profitability, and build a stronger financial foundation for growth.

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Exit Planner / Value Advisor



Darlene Shaffer

GPS Consulting USA, Business Value Growth Advisor

[Email](#) | [LinkedIn](#)

Doreen is the President of DGL Business Solutions Inc., a bookkeeping and business advisory firm that supports small and mid-sized businesses with dependable, confidential financial services. With a background in finance and 12 years of experience in Standard & Poor's Debt Rating Services Division, Doreen founded DGL Business Solutions in 2002. She helps business owners maintain accurate, timely financial information and understand their numbers so they can make clear decisions, improve profitability, and build a stronger financial foundation for growth



Cathy Li

Exit Factor of Fort Lee, Owner

[Email](#)

Cathy Li is the owner of Exit Factor of Fort Lee, where she helps small and mid-market business owners build companies that are more valuable, more profitable, and truly transferable. A former corporate executive and consultant, Cathy spent more than two decades leading valuation, risk management, and M&A initiatives for major financial institutions before turning her expertise toward helping entrepreneurs maximize the value of their life's work

Other



Mary Evans

Rutgers University, Lecturer

[Email](#) | [LinkedIn](#)

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List organized by Advisor Type.

Attorney



Andrew Egan

Bressler, Amery & Ross PC, Principal
[Email](#) | [LinkedIn](#)

Andrew Egan is one of New Jersey's premier fiduciary litigators. He focuses his practice on navigating emotionally-charged, high stakes probate, trust and guardianship litigation. Andy is an experienced trial attorney with a history of success in guiding clients to the most efficient business result in contentious disputes.



Len Garza

Garza Business & Estate Law, Principal
[Email](#) | [LinkedIn](#)

Len Garza, a principal at [Garza Law](#), specializes in protecting business owners and their families from legal conflict, handling transactions and contracts from entity formation to succession planning. He focuses on middle-market companies, providing services in business law, estate planning, trusts, and wills.

Business Broker



Vipin Singh

Murphy Business Sales, Business Broker
[Email](#) | [LinkedIn](#)

Vipin Singh has worked for 20+ years with global Fortune 500 corporations in Investment Banking, Sales, Finance, Risk Management, and Consulting teams. After working with large process-driven organizations like Visa, PwC, Morgan Stanley, General Motors, Merrill Lynch, Scholastic, Teleperformance, General Electric, and Hyatt, he incorporates the best practices utilized at these organizations in his business intermediary work.

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