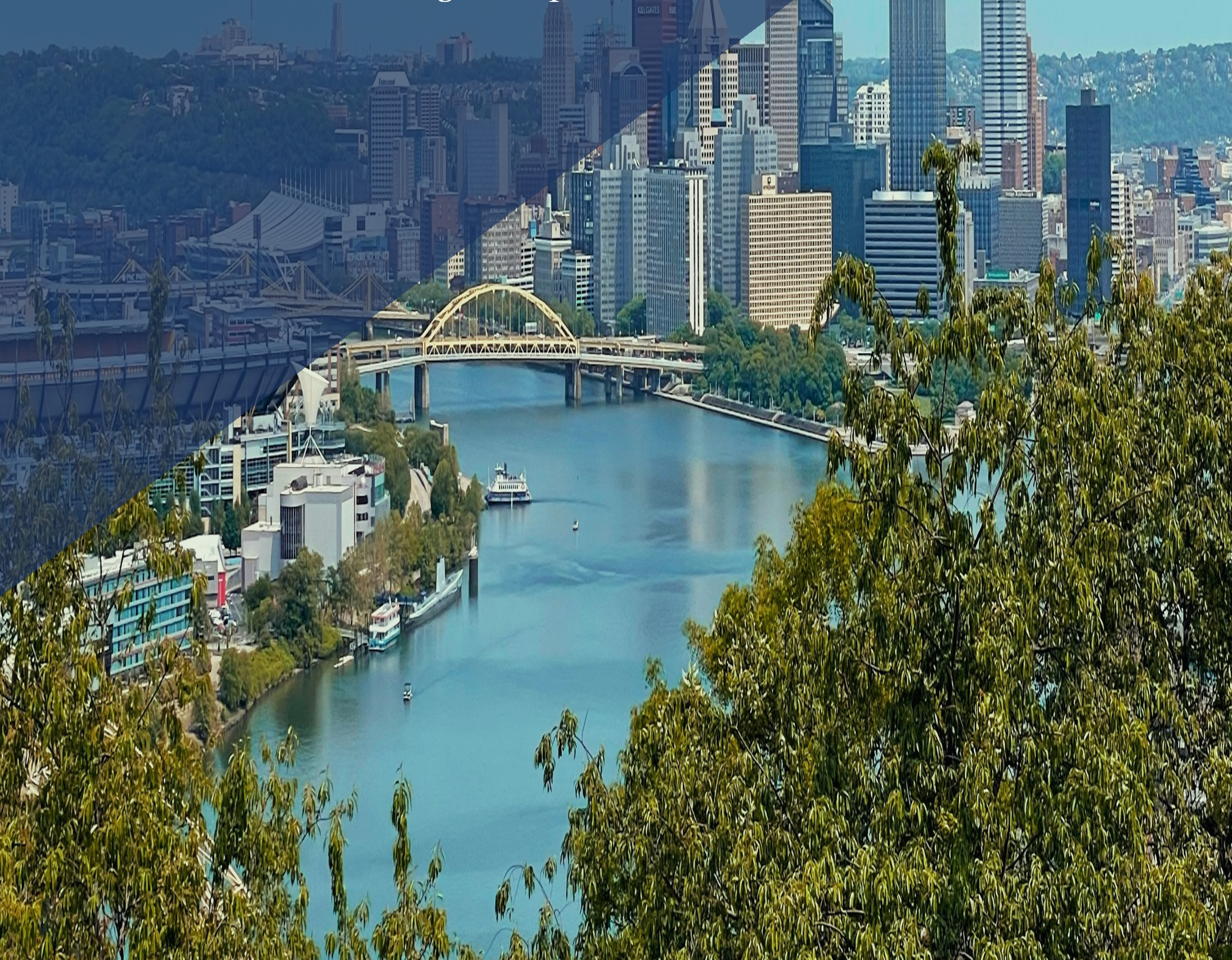
ADVISORS DIRECTORY

Exit Planning Institute

Pittsburgh Chapter



OUR PURPOSE

build awareness

OUR MISSION

At EPI Pittsburgh Chapter, we work to create a forum where the local community of professional advisors can collaborate to address unique needs of our community

change the outcome

TOGETHER,WE...

Develop educational programs for increased awareness, encourage and foster a positive adoption of best practices and help to promote the common business interests of those business advisors engaged in the profession of exit planning

become your client's most valued advisor

A THANK YOU FROM OUR EPI PITTSBURGH CHAPTER PRESIDENT

On behalf of the Pittsburgh Chapter of the Exit Planning Institute, thank you for being such an active and supportive part of our community. Your involvement is what makes our chapter thrive, and we're truly grateful to have you with us on this journey.

With the release of our second Pittsburgh Exit Planning Chapter directory, we want to take a moment to celebrate you—the advisors, collaborators, and champions who make this community so vibrant. Every step forward we've taken as a chapter has been fueled by your energy, your insights, and your willingness to show up and contribute.

At the heart of our work is a shared mission: to ensure business owners are supported through one of the most important transitions they will ever face. Your dedication to the Exit Planning Institute's vision—whether through your expertise, your presence at events, or the thoughtful conversations you've sparked—has helped turn that mission into reality here in Pittsburgh.

This directory is more than just a list of names. It's a resource to help us connect, collaborate, and strengthen the teams that guide business owners through the exit process. It reflects the incredible depth of talent in our chapter, and the commitment of each member to elevating the work we do for our clients and for the industry as a whole.

As we continue to grow, we remain committed to creating opportunities for learning, networking, and professional development—because we know that when we invest in each other, we all rise.

Thank you for being such an integral part of this journey. With your passion and expertise, and with tools like this directory to bring us together, we are shaping the future of exit planning—one successful transition at a time.

Warm regards,

BOARD LEADERSHIP TEAM

Andy Bianco, Holsinger, PC, Shareholder

thinkholsinger.com

Andy Bianco is a Shareholder at Holsinger and Managing Director at Strategic Advisors, where he helps businesses navigate tax, accounting, and mergers and acquisitions with confidence. A CPA with degrees from St. Vincent College and Villanova University School of Law, he's known for his practical approach and focus on tax-smart strategies. He has guided clients through complex transactions, transitions, and best practice implementations across a wide range of industries.

Jim Carlisle, Dinsmore & Shohl LLP, Partner

dinsmore.com

Jim Carlisle is a Partner at Dinsmore and Chair of the firm's Growth & Exit Planning Group, where he helps business owners maximize value and plan successful transitions. With more than 30 years of experience and a Certified Exit Planner (CExP) credential, he has led hundreds of domestic and international M&A transactions. Jim is known for his practical judgment and commitment to guiding clients through growth, exit, and succession strategies that align with their goals.

Michael Colella, Murphy McCormack Capital Advisors, Senior Vice President

murphymccormack.com

Mike Colella is a Senior Vice President at Murphy McCormack Captial Advisors, where he advises middle-market business owners and executives across the Mid-Atlantic on commercial lending and treasury management solutions. With more than a decade of experience, he has guided companies through succession planning, M&A, business expansion, and financing strategies across a wide range of industries. Mike is especially experienced in structuring exit plans, including ESOPs, internal transfers, and third-party sales, to help clients achieve their long-term goals.

BOARD LEADERSHIP TEAM

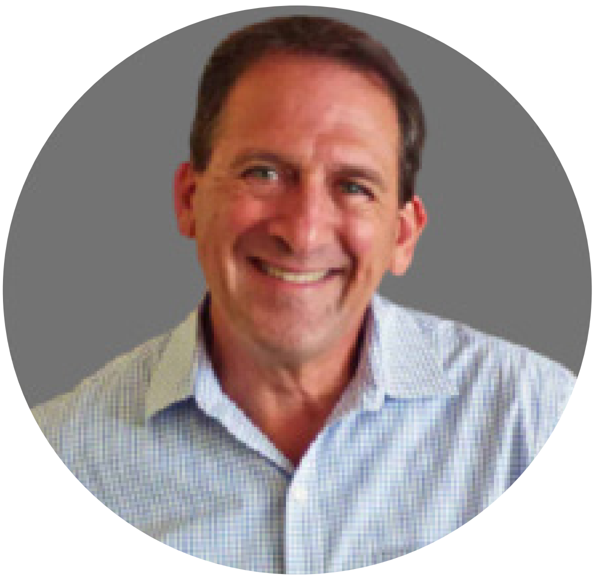
Louis Colella, JFS Wealth Advisors, Partner and Managing Director
jfswa.com

Lou Colella is Managing Director of the Business Growth & Transitions Advisors Team at JFS, where he helps business owners grow and manage wealth in their companies and personal portfolios. With more than 38 years of experience and credentials including CPA/PFS, CFP®, and CEPA, he specializes in investment management, wealth and estate planning, and exit planning strategies.

Sean Gibbon, JFS Wealth Advisors, Wealth Advisor

jfswa.com

Sean Gibbon is a Wealth Advisor and founding member of JFS Wealth Advisors' Business Growth & Transitions Team, where he helps entrepreneurs understand the value of their business and align it with personal and financial goals. Holding CPA/PFS, CFP®, and CEPA credentials, he specializes in investment management, wealth and estate planning, and exit planning strategies. Sean is passionate about guiding business owners through growth and transitions to achieve lasting success.



Michael Halperin, EOS WorldWide, Certified EOS Implementer

eosworldwide.com

Michael is a Professional EOS Implementer® with more than 30 years of leadership experience across sales, marketing, operations, and business consulting. A former CEO of Apogee IT Services, he scaled the company by nearly 300% and first implemented EOS® to manage its rapid growth. Since 2017, Michael has helped more than 50 entrepreneurial leadership teams harness the power of EOS to achieve clarity, growth, and results.

BOARD LEADERSHIP TEAM

Al Lorenzi, The LRM Group, LLC, Principal and Co-Founder
thelrmgroup.com

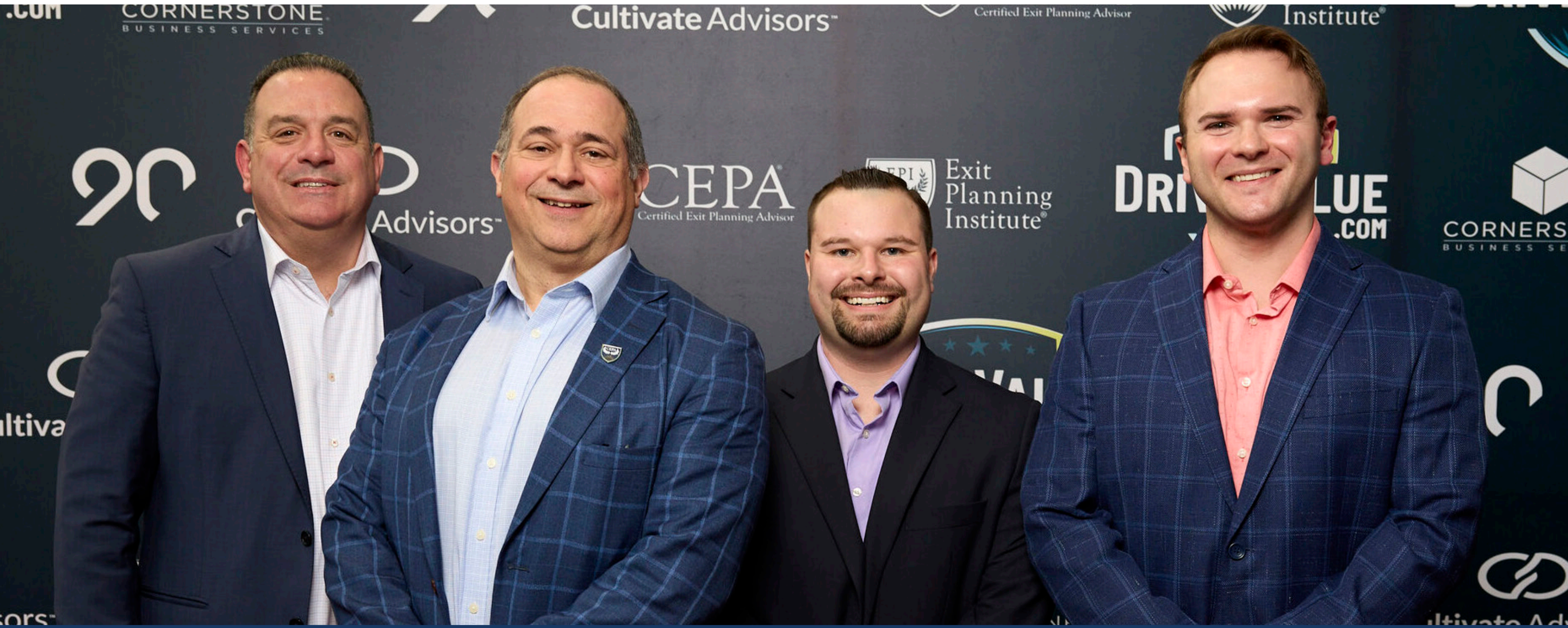
Al is Principal and Co-Founder of The LRM Group, where he provides objective insurance consulting support to fee-based and fee-only advisors and advisory firms. With expertise in advanced insurance planning, he specializes in personal, estate, business, and charitable planning, as well as reviewing and analyzing existing policies. A Certified Exit Planning Advisor (CEPA) and graduate of Robert Morris University, Al partners with financial professionals to design insurance strategies that align with client goals.

Dan Zugell, Business Transition Advisors (BTA), Senior Vice President
businesstransitionadvisors.com

Dan Zugell is Senior Vice President at Business Transition Advisors, Inc. (BTA), where he helps owners of closely held businesses achieve their succession and liquidity planning goals with a focus on Employee Stock Ownership Plans (ESOPs). With over 25 years of experience across investments, insurance, executive benefits, and ESOP planning, he is a nationally recognized thought leader and frequent speaker on business transition strategies. Dan holds a B.A. from Grove City College along with Chartered Financial Consultant and Accredited Estate Planner designations.

To learn more about EPI Pittsburgh Chapters Board Leadership Team, visit **exit-planning-institute.org/chapter/epi-pittsburgh-chapter**.

2025 SCHEDULE OF EVENTS



UPCOMING IN-PERSON EVENTS

Thursday, September 18 - Steel City Showdown at The Rivers Club

Thursday, October 23 - Drive Value Regional Summit in Wampum, PA

Thursday, November 20 - Win Through Teams at The Rivers Club (members only)

Thursday, December 18 - All I Want For Christmas Is A Solid Exit Plan at Omni William Penn Hotel

For more event details and times visit **exit-planning-institute.org/events.**

LEADERSHIP SPONSORS

BTA Business Transition Advisors

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Outside the box. Within the lines.℠

The LRM Group

Murphy McCormack Capital Advisors

JFS Wealth Advisors

Exit Planning Institute | Pittsburgh

OUR MEMBERS

Laurie Barkman, CEPA®, CM&AA, Certified Value Builder ™

Business Transition and M&A Advisor, The Business Transition Sherpa®

thebusinesstransitionsherpa.com

Laurie Barkman, The Business Transition Sherpa® is the former CEO of a $100 million company sold to a Fortune 50. She founded Business Transition Sherpa LLC, offering value-building and transition strategy services. Laurie is also a Certified M&A Advisor and Partner at Stony Hill Advisors, specializing in valuations, sell-side, and acquisition engagements for lower middle-market companies. A nationally recognized speaker, podcaster, author, and adjunct professor, her book The Business Transition Handbook and her award-winning podcast Succession Stories (ranked in the top 2% globally) highlight her expertise in business transitions.

Thomas Bartos, CEPA®

Area President, FocusCFO

focuscfo.com

With over 25 years of executive-level financial and managerial experience, Tom specializes in supporting privately held and family-owned businesses. Prior to FocusCFO, he was partner and CFO for two AI startups spun out of Carnegie Mellon University. His firsthand experience with launching and scaling companies makes him a valuable resource for business owners navigating growth and profitability.

Matthew Bolewtiz, J.D., MBA

Managing Partner, Cozza Law Group PLLC

cozzalaw.com

Matthew brings deep expertise in mergers and acquisitions, exit planning, and complex business transactions. Combining legal and financial skills, he helps clients navigate decisions that align with their long-term goals. Whether managing multi-million-dollar acquisitions or advising on succession planning, Matthew focuses on strategies that minimize risk and maximize value. His background as a financial analyst and accountant enables him to structure deals that drive financial success while meeting legal requirements.

Ken Chapel, CFP®, RICP®, CEPA®

Senior Vice President, Senior Financial Planner, WesBanco

wesbanco.com

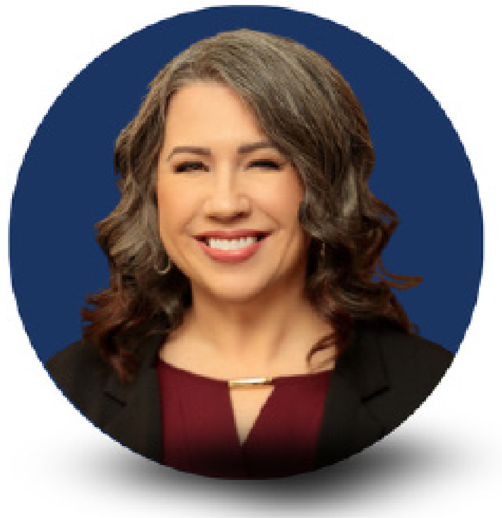
Kenneth Chapel, Senior Financial Planner at WesBanco Private Client Services, has over 30 years of experience in wealth management. He works with individuals, families, and businesses to provide tailored financial advice and education, using a goal-based approach to achieve clients' financial objectives. Ken is a member of the Pittsburgh Chapter of the Financial Planning Association and the Society of Financial Service Professionals.

Melanie Colusci, CFP®, AEP®, CEPA®

President, Bridger Financial Group

bridgerfinancialgroup.com

Melanie is the Founder and President of Bridger Financial Group, where she has spent over 20 years guiding individuals, families, and business owners through the complexities of financial planning. With credentials as a CFP®, AEP®, and CEPA®, she brings deep expertise and a truly holistic approach to her work. Melanie is passionate about helping her clients align their financial strategies with their personal vision. She works closely with CPAs and other professionals to uncover gaps, deliver tailored solutions, and empower clients to make informed decisions that support long-term success.



Randy Feger, MBA, CEPA®

Fractional CFO Service Provider, Area President, FocusCFO®

focuscfo.com

Randy is a financial executive with over 20 years of leadership experience in strategic planning, forecasting, budgeting, process improvement, working capital management, M&A, and more. He has held roles as Finance Director, CFO, and Controller at Vesuvius USA Corporation, and has also worked with Bethlehem Steel and Coopers & Lybrand (now PwC). Randy earned an MBA from Lehigh University and a B.S. in Accounting from Bloomsburg University. At FocusCFO, Randy is passionate about helping businesses improve financial processes, boost profitability, and maximize long-term value.

Mary McKinney Flaherty, J.D., MBA

Managing Partner, TobinLeff, LLC tobinleff.com/
tobinleff.com

Mary is an M&A advisor with over 20 years of experience helping founders navigate the financial, legal, and emotional complexities of selling and transitioning their businesses. With a background in law, corporate governance, and investment analysis, she builds value and develops sustainable deals. Mary has held roles in global law firms, business law boutiques, and family offices. She regularly speaks on corporate governance, negotiations, and writing, and has taught at university and executive education levels.

Jennifer Gilarski

Director of Business Development, Grossman Yanak & Ford LLP
gilarski@gyf.com

Jennifer is the Director of Business Development at Grossman Yanak & Ford LLP, where she leads strategic initiatives to grow the firm's client base and build meaningful referral partnerships. With deep expertise in business development, She has a proven track record of creating scalable frameworks and connecting CPAs, attorneys, bankers, and business advisors. Her career reflects a strong commitment to supporting small businesses and helping them thrive—something rooted in her own family's small business background.

Jay Hagerman, J.D.

Managing Partner, Abernethy & Hagerman, LCC
a-h.law

Jay Hagerman is a partner at Abernethy & Hagerman, LLC in Allison Park, Pennsylvania. After practicing outside of his hometown of Hampton Township, he is excited to return and establish his office at the heart of the community. While based in the north hills of Allegheny County, his clients span from Washington County to Mercer County. Jay specializes in estate planning, estate administration, probate, trusts, elder law, and real estate transactions, and looks forward to serving his friends, family, and the local community.

Matt Harnett, CAIA

Partner, Tecum Capital Partners

tecum.com

As the deal team lead, he has closed and managed the full life cycle of more than 100 transactions and, alongside his long-standing investment partners, has invested over $1 billion across multiple funds. Matt serves on numerous boards, including Aging with Comfort, BP Business Solutions, Connecticut Electric, Conco Services, Midwest Equipment Sales, etc., and is a Board Observer for several other companies. He is also active in the Small Business Investor Alliance (SBIA) and serves on the Board for the Pittsburgh Chapter of the Association of Corporate Growth (ACG).

Dan Jenkins, CLU®, ChFC®, AEP®

Founder/Wealth Management Advisors, JKS Financial

jks-financial.nm.com

Dan Jenkins is a Wealth Management Advisor with over 30 years of experience at JKS Financial. Specializing in tax-efficient asset accumulation, retirement income distribution, and intergenerational wealth transfer, he works closely with business owners, corporate executives, and physicians. Dan is committed to building long-term client relationships, helping clients reassess their goals as their needs evolve. Dan is an active member of several professional organizations, including the Estate Planning Council of Pittsburgh, the Financial Planning Association, and MDRT's Top of the Table.

Joe Karlovits, CPA

Senior Consultant, ERP Solutions, Grossman Yanak & Ford LLP

gyf.com

Joe brings a diverse background spanning public accounting, private industry, start-ups, and the non-profit sector. A graduate of Robert Morris University with a degree in Accounting, he began his career in the Washington, D.C. area before returning to Pittsburgh, where he gained experience with commercial real estate, publicly traded companies, and small business consulting. His leadership roles at the Urban Redevelopment Authority and Pittsburgh Parks Conservancy broadened his expertise beyond finance into operations, HR, and IT.

Ryan Kennis, CFP®, CEPA®

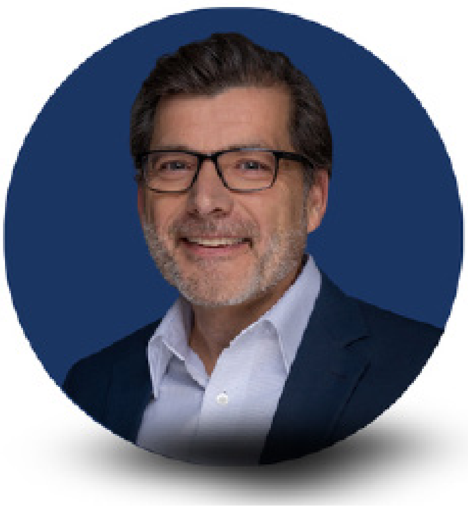
Wealth Advisor, JFS Wealth Advisors jfswa.com
jfswa.com

Ryan Kennis is a Wealth Advisor with over 20 years of experience in financial services, specializing in high-net-worth clients. He develops, implements, and monitors personalized financial solutions and is part of the Financial Planning and Wealth Strategies Team. Before joining JFS, Ryan spent two decades at PNC Bank and most recently worked at Citizens Bank in their Clarfeld Citizens Private Wealth division. Ryan holds a Bachelor's in Marketing and Accounting from Mercyhurst University and an MBA in Finance from Duquesne University.

Brad Matthews, CPA/ABV, CVA

Senior Manager in the Business Valuation Services Group
Grossman Yanak & Ford LLP
gyf.com

Brad is a CPA with deep expertise in business valuation, appraisal, and litigation support. Since joining GYF in 2011, he has worked with clients across industries—from manufacturing and healthcare to technology and professional services—helping them navigate valuations for tax planning, ESOPs, shareholder disputes, buy/sell transactions, and more. He has played a significant role in valuations for gift and estate tax planning, Employee Stock Ownership Plans (ESOPs), shareholder disputes, marital dissolutions, financial and tax reporting, buy/sell transactions, and general business planning.



Jeff McGraw

Vice President and Managing Director, WilliamCharles Search Group
william-charles.com

With over 30 years of experience in the search industry, Jeff is a proven leader in sales, business development, and operations. He's served as a recruiter, firm owner, and shareholder across three organizations—and today, he brings that depth of expertise to his current role at WilliamCharles Search Group. Jeff joined WilliamCharles in April 2024 through the integration of his firm, Reflex Search Solutions. He leads sales development, account management, and client relationships with a focus on growth and continuous improvement.

Christine Musuneggi, CEPA®,CRPC®, CLTC, LACP

Private Wealth Advisor, The Musuneggi Financial Group, LLC

mfgplanners.com

Christine Musuneggi is a trusted financial advisor helping clients navigate everything from budgeting to major milestones like building a dream home, business exit strategies, retirement planning, and legacy creation. With a background from the University of Pittsburgh, she initially pursued architecture but shifted her focus to guiding business owners through successful transitions. A leader in her field, Christine has served in national trade associations and participated in leadership programs with figures like General Colin Powell and Stephen Covey.

Alexander Park, CEPA®

Relationship Manager, Fifth Third Wealth Advisors

53.com/content/fifth-third/en/wealth-management/wealth-advisors.html

Alex is a Relationship Manager with Fifth Third Wealth Advisors, where he provides comprehensive wealth management solutions to high-net-worth individuals and families, as well as foundations and institutional clients. With over a decade of financial industry experience, Alex brings a client-first approach to portfolio design, asset allocation, and long-term strategy development Before joining Fifth Third, Alex spent more than eight years with BNY Mellon in a variety of wealth management roles, most recently as a Wealth Manager. He is a Certified Exit Planning Advisor (CEPA) and works closely with clients to align their financial plans with long-term goals, especially in moments of transition.

Kevin Renne, CFP®, CEPA®

Managing Partner, Wealth Advisor, JFS Wealth Advisors

jfswa.com

Kevin K. Renne, Partner and Wealth Advisor at JFS since 2017, brings over 22 years of experience in wealth management. Based in Pittsburgh, he specializes in tailored financial solutions for high-networth families and institutional asset management. Kevin emphasizes education, planning, and implementation to help clients achieve their financial goals. He holds a BA in Business Management and Marketing from the University of Pittsburgh, an MBA from Penn State, and is a CERTIFIED FINANCIAL PLANNER® and Certified Exit Planning Advisor (CEPA®).

Jim Schriver

President, Tech Growth Strategies Corp.

techgrowthpgh.com

Jim brings 30 years of experience helping technical businesses grow revenues, find new clients, and expand into new markets. As the leader of a marketing and business strategy consultancy, he has partnered with countless organizations to accelerate growth and uncover new opportunities. Jim serves as a Growth Consultant and Value Advisor—guiding business owners to unlock the full potential and value of their organizations. With his deep technical background, Jim is uniquely equipped to help technical business owners transform their industry expertise into tangible business value, ultimately supporting them in achieving their personal, professional, and financial goals.

Ethan Stewart, CFP®, CEPA®

Certified Financial Planner, Centennial Financial Group LLC

centennialfinancialgroup.net

Ethan is a CERTIFIED FINANCIAL PLANNER™ and Certified Exit Planning Advisor with over 10 years of experience helping individuals—especially business owners—build smart, forward-looking financial plans. A graduate of Virginia Commonwealth University, Ethan combines his financial expertise with a passion for entrepreneurship. He founded 814 Worx, a co-working space that supports local startups, and stays actively involved in his community through groups like the Humane Society and JIDC.

Jack Teitz, MBA, CPA, CEPA®

WorldClass Business Solutions, Inc.

Jack brings over 40 years of experience as a CPA, advisor, business owner, and restructuring expert. He holds degrees from Georgetown University (BS) and the University of Pittsburgh (MBA) and recently earned his CEPA designation (2024). His career includes co-owning a steel processing business, advising 200+ financially distressed companies, and serving as a sell-side advisor in Chapter 11 cases. Jack was honored with the Lifetime Achievement Award from the Turnaround Management Association – Pittsburgh Chapter.

Lloyd Wolf, Certified EOS Implementer

Certified EOS Implementer, EOS Worldwide

eosworldwide.com/lloyd-wolf

In 1989, Lloyd Wolf, a young engineer, started a part-time side business that eventually became his full-time focus. Over the next 30 years, the company grew into a leading provider of computer support for small and mid-sized businesses. After successfully selling the business, Lloyd retired. Throughout his entrepreneurial journey, Lloyd experienced both successes and challenges, including setbacks and sleepless nights. A key turning point came in 2015 when a business friend introduced him to EOS.

Victor Yates

Nationwide Advisory Life RVP, Nationwide Advisory Solutions

yatesv1@nationwide.com

Victor began his career in personal production, earning honors such as Rookie of the Year, MDRT, and the National Quality Award from NAIFA. He later transitioned into management, where he recruited, trained, and developed advisors, and then into a wholesale distribution role with a national broker-dealer and RIA. Today, this background uniquely supports his work at Nationwide Advisory, where he helps advisors deliver holistic financial planning solutions to their clients.

Robert Zahner, CPA/ABV, ASA, CVA

Relationship Manager, HBK Valuation Group

hbkvg.com

Robert specializes in valuations for estate planning, shareholder transactions, ESOPs, financial reporting, and litigation support. With a background as a CPA, he brings strong tax and accounting insight to every project. He holds several credentials—ASA, CVA, and ABV—and was named to NACVA's 2020 40 Under 40. Robert frequently speaks at industry events and has been admitted as an expert witness in multiple Pennsylvania counties.

PARTNER WITH US

EVENT SPONORSHIP

TIERS -

1. **PLATINUM - $1,500.00**
   (Limit: 3)
2. **GOLD - $1,000.00**
   (Limit: 8)
3. **SILVER - $500.00**
   (Limit: 0)

Call a board member for more information

PERKS -

Social media & email advertising

Complimentary attendance

Event recognition & speaking opportunities

Featured company logo & signage

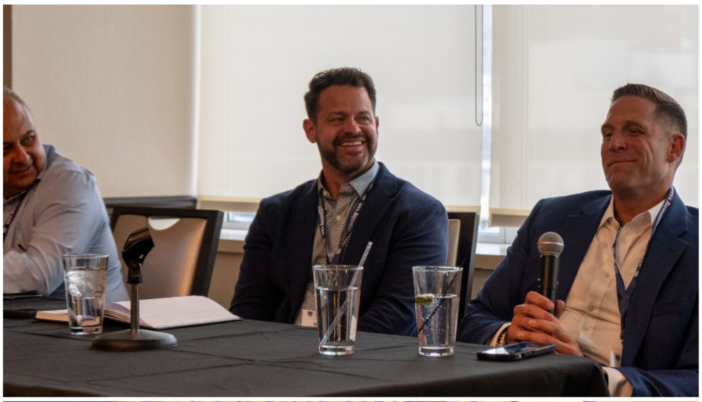
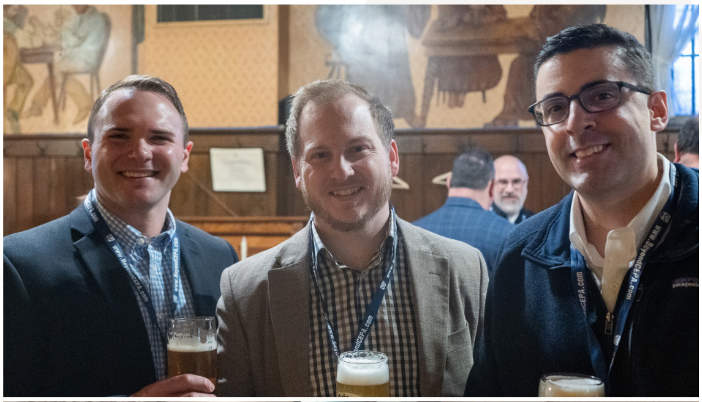
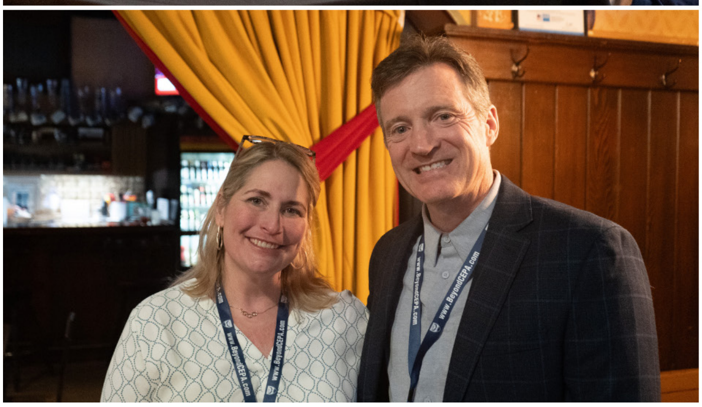
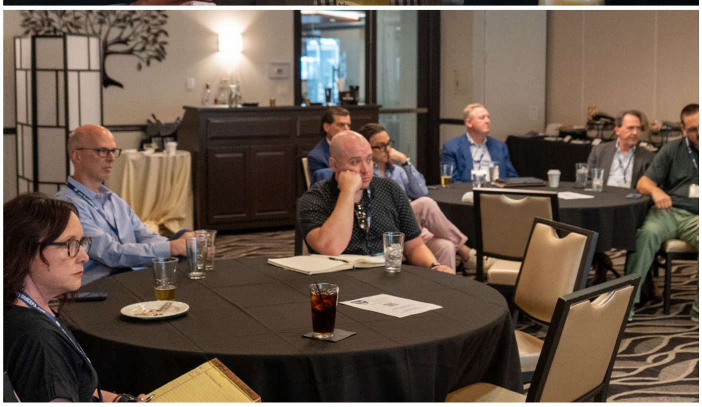
BECOME A MEMBER

Membership denotes and highlights to your craft and your commitment to the role of being a trusted advisor.

MEMBERSHIP BENEFITS:

❖Access to all events monthly (including two members-only events)
❖Pre and post-meeting registration list
❖Social media spotlights and event recognition
❖Prominently featured online on EPI Pittsburgh website

ANNUAL INVESTMENT: $600

For additional details and sign up, visit exit-planning-institute.org/chapter/epi-pittsburgh-chapter

DRIVE VALUE

75%

OF BUSINESS OWNERS WOULD LIKE TO EXIT THEIR BUSINESS WITHIN THE NEXT 10 YEARS, A $14T OPPORTUNITY

2/3

OWNERS CONSIDER THEMSELVES AND THEIR BUSINESSES ABOVE AVERAGE FOR TRANSITION READINESS

YET

ONLY 20-30% OF BUSINESSES WILL EVER SELL

THIS IS WHY WE MUST...

BETTER EDUCATE

BUSINESS OWNERS ARE MORE LIKELY TO TAKE ACTION THAN THOSE WHO ARE NOT

RAISE THE BAR

ADVISORS LIKE US, HAVE A DUTY AND RESPONSIBILITY TO BE AT OUR BEST TO IMPROVE THESE STATISTICS

BUILD A TEAM

FOCUSED ON HOLISTIC APPROACH WITH CONSIDERATION OF ALL 3 LEGS OF THE STOOL

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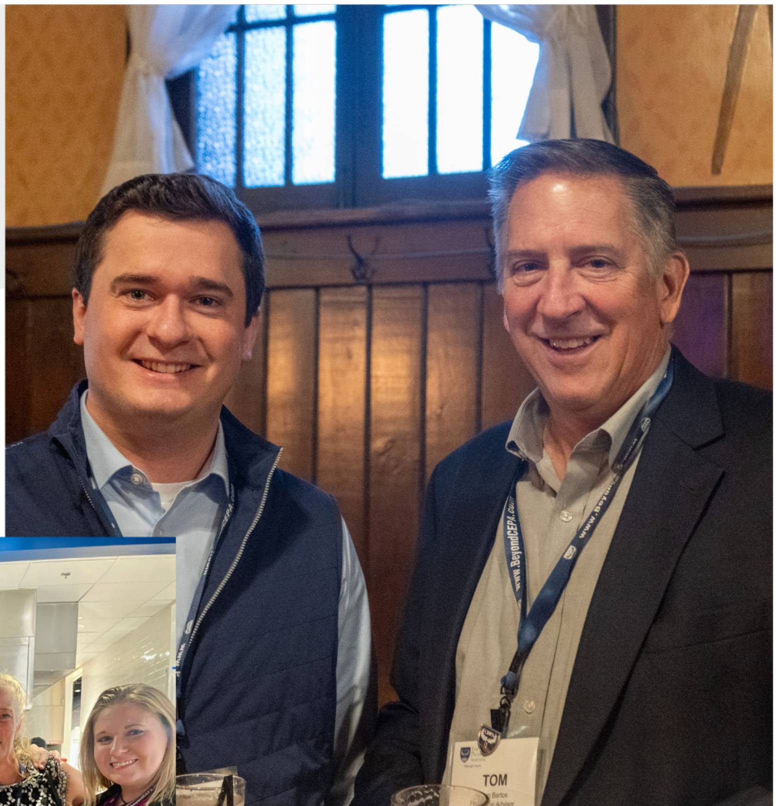
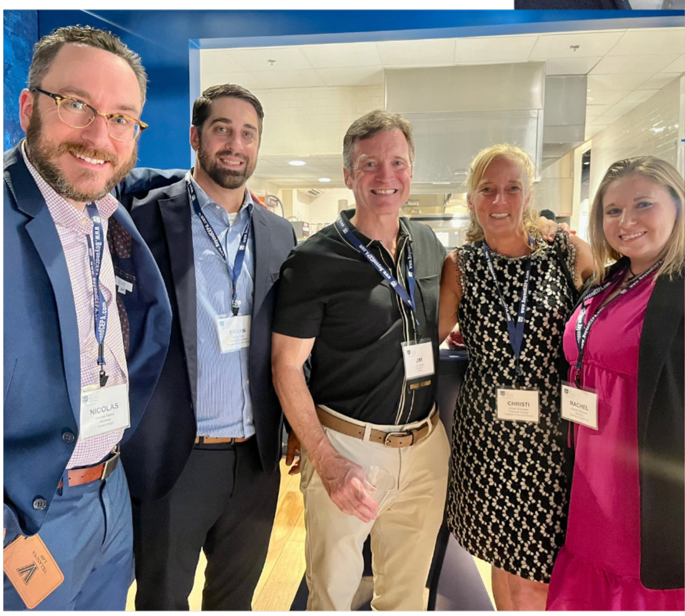
Robert Zahner	rzahner@hbkvg.com	412- 763-3056
Dan Zugell	dzugell@bta.us.com	724-766-3998





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