ADVISORS DIRECTORY

Exit Planning Institute

Pittsburgh Chapter

SPRING 2026

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 the President of the EPI Pittsburgh Chapter

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 engagement is what allows our chapter to thrive, and we are truly grateful for the time, energy, and expertise you bring to this group.

With the release of our 2026 Pittsburgh Exit Planning Chapter directory, we are proud to reflect on a year of meaningful growth and momentum. In 2025 alone, our chapter welcomed more than twenty-nine new members—an exciting milestone that speaks to the strength of our community and the value of the relationships built here. This growth would not be possible without the dedication of our existing members, who continue to foster a welcoming, collaborative environment.

At the heart of our work is a shared mission: to support business owners through one of the most significant transitions they will ever face. Your commitment to the Exit Planning Institute's vision—through your expertise, participation in events, and thoughtful collaboration—has helped bring that mission to life in the Pittsburgh region.

This directory is more than a list of names; it is a reflection of the collective talent, experience, and commitment within our chapter. It serves as a tool to strengthen connections, encourage collaboration, and build trusted teams that guide business owners through the exit planning process with confidence.

As we continue to grow, we remain deeply committed to creating meaningful opportunities for learning, networking, and professional development. We are incredibly thankful for each member who has contributed to our success this year and helped shape the chapter into what it is today.

Thank you for being an integral part of this journey. Together, we are shaping the future of the business community in Pittsburgh—one successful transition at a time.

Warm regards,

BOARD LEADERSHIP TEAM

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

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

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Laurie Barkman is the Founder of Business Transition Sherpa and a former CEO who led and sold a $100M company to a Fortune 50 buyer. A Certified M&A Advisor and Partner at Stony Hill Advisors, she specializes in valuation, sell-side, and acquisition engagements for lower middle-market companies. Laurie is also a nationally recognized speaker, author, and host of the award-winning Succession Stories podcast.

Jim Carlisle, J.D., CExP

Business Transition and M&A Advisor,
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Jim Carlisle is a Partner at Dinsmore and Chair of the firm's Growth & Exit Planning Group, helping business owners maximize value and plan successful transitions. With 30+ years of experience and a Certified Exit Planner (CExP) credential, he has led hundreds of domestic and international M&A transactions and advises clients on growth, succession, and exit strategies aligned with their goals.

BOARD LEADERSHIP TEAM

Michael Colella

Senior VP, Investment Banking
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Mike Colella is a Senior Vice President at Murphy McCormack Capital Advisors, advising middle-market business owners across the Mid-Atlantic on commercial lending, treasury management, and growth strategies. With 10+ years of experience, he supports succession planning, M&A, financing, and exit strategies, including ESOPs, internal transfers, and third-party sales.

Lou Colella, CEPA®, CPA/PFS, CFP®

Partner, Managing Director, Business Growth and Transitions Team | Wealth Advisor
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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.

BOARD LEADERSHIP TEAM

Sean Gibbon, CEPA®, CPA/PFS, CFP

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As a Wealth Advisor with the JFS Business Growth & Transitions team, Sean helps clients—especially entrepreneurial business owners—plan for growth, maximize business value, and prepare for successful transitions. He also serves as President of the Pittsburgh chapter of the Exit Planning Institute, where he works to connect and educate business owners and their advisors.

Al Lorenzi, CEPA®

Principal and Co-Founder
The LRM Group, LLC

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Al is an independent insurance and advanced markets consultant specializing in life, disability, and long-term care insurance analysis. He works closely with financial professionals, RIAs, wealth advisors, and legal and tax advisors to provide objective consulting on insurance strategy and planning. His work often supports estate, business, and charitable planning, including detailed reviews and analysis of existing insurance policies.

BOARD LEADERSHIP TEAM

Lloyd Wolfe

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Lloyd is a Certified EOS Implementer® who works with business owners and leadership teams in Pittsburgh and Western Pennsylvania to help companies with 10–250 employees achieve more from their businesses. As a teacher, facilitator, and business coach, he guides organizations through implementing EOS® (the Entrepreneurial Operating System®), a practical framework that helps leaders build stronger companies and create better lives.

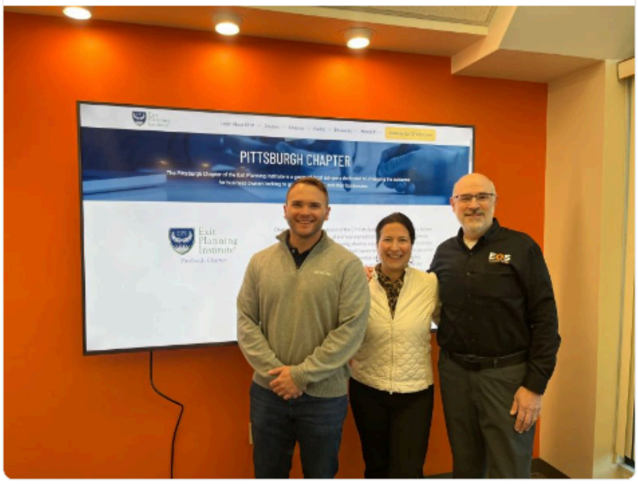
Recent Leadership Highlights

EPI Pittsburgh Chapter
553 followers
1mo •

From chapter members to board leaders — exciting things are happening at EPI Pittsburgh! 👏

We're proud to announce that Laurie Barkman and Lloyd Wolf have officially joined our Board Leadership Team after being valued members of our chapter. Their dedication to our community makes this a natural next step, and we're so excited to see the impact they'll make in this new role.

Congratulations, Laurie and Lloyd!



EPI Pittsburgh Chapter
553 followers
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We're incredibly grateful to everyone who joined us for the EPI Pittsburgh Chapter's first event of 2026! The evening was an engaging and insightful conversation centered on "Business for Sale: Navigating the Challenges and Closing the Deal," and it was a pleasure to bring together so many experienced professionals from our community.

A special thank you to our outstanding panelists—Matthew B., Mary McKinney Flaherty, and Donald Johnston—for generously sharing their expertise and real-world perspectives on navigating challenges and successfully closing business sale transactions.

We're also grateful to Mike Colella for his thoughtful questions and skillful guidance in keeping the conversation dynamic and impactful.

Thank you to everyone who attended and contributed—your questions and perspectives made this a rich, meaningful exchange. We look forward to continuing the dialogue and welcoming you to future EPI Pittsburgh Chapter events.

PITTSBURGH CHAPTER EVENTS

UPCOMING SCHEDULE

Thursday, March 19, 2026 - Time to Grow Your Network: Social

Thursday, April 16, 2026 - Choose Wisely: Finding Success in Your Successor (Members Only)

Thursday, May 21, 2026 - Talent Show: Attracting and Keeping Your People

Thursday, June 18, 2026 - Prost to Summer! EPI Chapter Social

For more event details and times visit **exit-planning-institute.org/events.**
*Note, all chapter events and their dates and times are subject to change.

LEADERSHIP SPONSORS

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JFS Wealth Advisors

Exit Planning Institute | Pittsburgh

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GET TO KNOW OUR MEMBERS

Aaron Aldrich | Northwest Bank
Aaron Aldrich is Senior SBA Business Development Officer at Northwest Bank with 20 years of experience in financial services. He specializes in SBA lending solutions and works closely with business owners to structure creative financing strategies. Aaron is active in community and nonprofit leadership roles and collaborates with advisory teams to support sustainable business growth and transition planning.

Tom Bartos | FocusCFO
Tom Bartos is a financial executive with more than 25 years of experience supporting privately held and family-owned businesses. His background includes public accounting, corporate finance, and leadership roles in startups and high-growth organizations. Tom partners with business owners to strengthen financial strategy, improve operational performance, and enhance enterprise value in preparation for future transitions.

Laurie Barkman | Business Transition Sherpa LLC & Stony Hill Advisors
Laurie Barkman, The Business Transition Sherpa®, is the former CEO of a $100M revenue company that was sold to a Fortune 50 buyer. She is the founder of Business Transition Sherpa LLC, where she advises business owners on value building and transition strategy, and a Certified M&A Advisor and Partner with Stony Hill Advisors, providing valuation, sell-side, and acquisition advisory services. Laurie is an award-winning speaker, author, podcast host, and adjunct professor who is deeply engaged in the exit planning community.

Matt Bolewitz | Cozza Law Group PLLC
Matt Bolewitz brings extensive experience in mergers and acquisitions, exit planning, and complex business transactions. With a background in law, finance, and accounting, he helps clients align strategic decisions with long-term goals while minimizing risk and maximizing value. Matt works closely with business owners and advisory teams to support acquisitions, divestitures, and succession planning initiatives.

Ken Chapel | WesBanco Private Client Services
Ken Chapel is a Senior Financial Planner with more than 30 years of experience in wealth management. He works with individuals, families, and business owners to deliver goal-based financial planning and holistic strategies aligned with long-term objectives. Ken holds a master's degree in finance and the CFP™ certification and is actively involved in professional and nonprofit organizations.

Steven Cherin | Pittsburgh Entrepreneurs Forum
Steven Cherin is an experienced advisor focused on helping business owners navigate complex financial and strategic decisions. He collaborates with interdisciplinary advisory teams to develop practical solutions that support growth, risk management, and long-term value creation. Steven brings a thoughtful, client-centered approach to exit planning and business strategy.

Melanie Colusci | Bridger Financial Group
Melanie Colusci works with business owners and professional advisors to support strategic planning, financial clarity, and long-term value creation. Her experience spans advisory services, client relationship management, and collaborative planning within multidisciplinary teams. Melanie is committed to helping

GET TO KNOW OUR MEMBERS

Randy Feger | FocusCFO
Randy Feger is a seasoned financial executive and fractional CFO with more than 20 years of leadership experience across strategy, finance, and operations. His background includes CFO and senior finance roles in manufacturing and industrial organizations, as well as experience in M&A and business transformation. Randy helps business owners improve financial performance, strengthen processes, and maximize enterprise value.

Mary McKinney Flaherty | City of Pittsburgh, Office of Mayor O'Connor
Mary McKinney Flaherty serves as the Deputy Director of Economic Development for the City of Pittsburgh, where she focuses on strengthening the city's economic ecosystem and supporting local entrepreneurs. Previously, Mary worked as an M&A advisor, helping founders navigate the financial, legal, and emotional complexities of selling and transitioning their businesses.

Jennifer Gilarski | Grossman Yanak & Ford LLP
Jennifer Gilarski is Director of Business Development at Grossman Yanak & Ford LLP. She leads strategic growth initiatives, builds referral networks, and strengthens partnerships among professional advisors. Jennifer brings extensive experience in financial services and business development, with a focus on fostering meaningful relationships across the exit planning ecosystem.

Jay Hagerman | Abernethy & Hagerman, LLC
Jay Hagerman is an attorney focused on estate planning, elder law, business law, real estate, and tax matters. He helps individuals and business owners navigate complex legal situations with clarity and confidence, providing practical solutions to life's legal challenges. Jay serves clients throughout Western Pennsylvania and collaborates closely with advisory teams on long-term planning strategies.

Matt Harnett | Tecum Capital Partners
Matt Harnett is a founding Partner at Tecum Capital Partners and a member of the firm's Investment Committee. He has led more than 100 private equity and mezzanine transactions and brings deep expertise in sourcing, structuring, and executing investments in middle-market companies. Matt works closely with management teams and advisors to support growth and value creation initiatives.

Dan Jenkins | JKS Financial
Dan Jenkins is a Wealth Management Advisor with more than 30 years of experience in strategic wealth management and financial planning. He specializes in tax-efficient asset accumulation, retirement income planning, and intergenerational wealth transfer for business owners and executives. Dan holds the AEP® and CLU® designations and is active in professional and community organizations across Pittsburgh.

Don Johnston | Grossman Yanak & Ford LLP
Don Johnston is a tax and consulting advisor with more than 35 years of experience serving privately held businesses. His expertise includes M&A, tax strategy, transaction structuring, and complex planning for middle-market companies across multiple industries. Don partners with business owners and advisory teams to design strategies that support growth and successful transitions.

GET TO KNOW OUR MEMBERS

Jeff McGraw | WilliamCharles Search Group

Jeff McGraw is Vice President and Managing Director at WilliamCharles Search Group with more than 30 years of experience in executive search, business development, and leadership. He is recognized as a catalyst for growth and has held leadership roles in global recruiting organizations and industry associations. Jeff partners with business leaders to align talent strategy with long-term value creation.

Brad Matthews | GYF Valuation Services

Brad Matthews is a CPA specializing in business valuation, litigation support, and transaction advisory. He works with clients across industries to address valuation needs for tax planning, ESOPs, disputes, buy/sell agreements, and strategic business planning. Brad collaborates with advisory teams to deliver insights that support informed decision-making and enterprise value growth.

Christine Pikutis-Musuneggi | The Musuneggi Financial Group, LLC

Christine helps families to make informed decisions with their money. She brings twenty-eight years of financial advisory and operations experience to the needs of business owners and families with complicated financial decisions. At MFG, family shapes our whole philosophy: Our clients and their families are our business, and our business is to treat them like family.

Christine works with owners of small and family-owned businesses on Employer Sponsored Retirement Plans and Exit Strategies. She also works with individuals to create a legacy for the ones they love. She is a Top of the Table Member of the Million Dollar Round Table, a twelve-year Five Star Wealth Manager, National Quality Award recipient, Keystone Award recipient. She is a member of the National Association of Insurance and Financial Advisors and the Exit Planning Institute.

Alexander Park | Fifth Third Wealth Advisors

Alexander Park is a Relationship Manager with Fifth Third Wealth Advisors, serving high-net-worth individuals, families, and institutions. With more than 10 years of industry experience, he specializes in portfolio design, asset allocation, and comprehensive wealth management solutions. Alexander holds the CEPA® designation and works closely with advisory teams to support client goals.

Kevin Renne | JFS Wealth Advisors

Kevin Renne is a Partner and Wealth Advisor with more than 22 years of experience serving high- and ultra-high-net-worth families. He specializes in comprehensive financial planning, wealth management, and exit planning strategies. Kevin holds the CFP® and CEPA® designations and is actively involved in professional and community organizations in the Pittsburgh region.

Jim Schriver | Tech Growth Strategies

Jim Schriver is President of Tech Growth Strategies, a marketing and business strategy consultancy. With more than 30 years of experience working with technical businesses, he helps owners grow revenue, enter new markets, and unlock enterprise value. Within the EPI ecosystem, Jim serves as a Growth Consultant and Value Advisor.

GET TO KNOW OUR MEMBERS

Tyler Lyster | Seubert & Associates, Inc.
Tyler Lyster is Vice President of Operations at Seubert & Associates, Inc., overseeing commercial lines, surety bonding, and employee benefits. With more than 10 years of experience in commercial insurance, he serves clients across construction, healthcare, real estate, transportation, and manufacturing industries. Tyler partners with advisory teams to help

Victor Yates | Nationwide Advisory Life Distribution
Victor Yates is a Regional Vice President supporting financial advisors nationwide with holistic planning strategies and client solutions. His background includes advisor development, wholesale distribution, and leadership roles in financial services. Victor provides training, consulting, and case support for advisory firms, with a focus on collaborative planning and client impact.

Robert Zahner | HBK Valuation, Litigation & Forensics
Robert Zahner is the Principal-in-Charge of HBK's Valuation, Litigation, and Forensics practice in Pittsburgh. His expertise includes business valuation, estate and gift tax planning, shareholder transactions, ESOPs, and litigation support. Robert is a CPA and holds multiple valuation credentials, including ASA, CVA, and ABV.

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

PARTNER WITH US

EVENT SPONSORSHIP

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 -

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