

Wednesday, May 23, 2018

5:00pm - 7:30pm

Grant Thornton - 171 N Clark St.

The Board and Tax Experts: A Dialogue on the New Tax Laws and Private Companies



Moderator
Leah Bailey
Bailey Management
Consulting



Speaker
Eric Gerstein
Vice President of Tax,
Medline Industries



Speaker
Bruce D. Werner
Managing Director,
Kona Advisors LLC



Speaker
Renato Zanichelli
National Managing
Partner, Tax Reporting &
Advisory, Grant Thornton

Upcoming Events

DATE	TIME	EVENT	LOCATION
Wednesday, June 20, 2018	5:00 - 7:30pm	Monthly Meeting: The Value of Board Diversity	Bank of America
Wednesday, July 18, 2018	5:30 - 10:00pm	Ravinia Social	Ravinia Festival
Thursday, August 09, 2018	11:30am - 6:30pm	Annual Golf Outing	Rolling Green Country Club
Wednesday, September 26, 2018	5:00 - 7:30pm	Monthly Meeting	TBD
Wednesday, October 17, 2018	5:00 - 7:30pm	Monthly Meeting	Grant Thornton
Wednesday, November 14, 2018	5:00 - 7:30pm	Monthly Meeting	Northern Trust

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Moderator: Leah Bailey | Bailey Management Consulting

Leah Bailey is a corporate executive with deep experience in marketing and general management in consumer products, with an expertise in beauty products. For over 30 years, she has served as a leader in small, medium and large organizations in private and public companies.

Leah's current work is in strategic consulting. She teaches Strategic Thinking at Lake Forest Graduate School of Management. She also serves as a judge for the Chicago Booth New Venture Challenge.

Most recently, Leah was the President of Global Beauty for Helen of Troy Limited (NASDAQ:HELE). Previously, Leah was the President & CEO of Paris Presents, Inc. a privately held marketer of beauty products.

Leah serves on the boards of Frontier Co-op, Scott's Liquid Gold and recently joined the advisory board for Precious Moments. She is a member of the National Association of Corporate Directors and the Private Directors Association.

Leah holds a Bachelor of Arts degree from Johns Hopkins University and an MBA from Harvard University.



Speaker: Eric Gerstein | Vice President of Tax, Medline Industries

Medline Industries, Inc.

Eric has led the tax function for Medline Industries, Inc. (a family owned S-Corporation) for the last 6 years. During his tenure at Medline, Eric has focused on value added initiatives including:

- Numerous incentives on new locations and facilities federal, state and local governments
- A principal operating company model in Europe and Asia
- A global sourcing company
- Efficient repatriation of funds from overseas
- In addition, Eric's team is responsible for certain legal entity and treasury matters.

Deloitte

Eric spent nearly 10 years at Deloitte concluding his tenure there as a Senior Manager in the BTS/Large Corporate Group. Eric's client base included a variety of global companies ranging from privately held flow through entities to US and international global publicly traded companies to a large Private Equity/Hedge Fund group.

Andersen

Eric began his career at Arthur Andersen after the conclusion of his undergraduate work. At AA Eric was a member of the Large Corporate group focusing on tax consulting for multinational businesses.

Professional qualifications and memberships

- Member of the American Institute of Certified Public Accountants

Eric received his Bachelor's of Accounting from the University of Miami and his Master's of Science of Taxation from DePaul University.



Speaker: Bruce D. Werner | Managing Director, Kona Advisors LLC

Bruce Werner is the Managing Director of Kona Advisors LLC, a strategic advisory boutique that specializes in serving the needs of family-owned and closely held middle market businesses. With deep experience in governance, succession planning, finance, strategy and management issues, Kona Advisors brings a broad perspective to developing meaningful solutions for its clients.

Mr. Werner writes and speaks on issues of concern to private and family businesses, and continues to serve as an outside director for a number of private companies.

In addition to his work with middle-market companies, Bruce has been both a principal and an advisor to several investment firms, with experience in running venture, private equity, hedge and real estate funds, as well as futures & options trading operations.

Mr. Werner spent 12 years at Werner Holding Co. in a variety of senior line and staff positions. He held executive responsibilities in the Climbing Products, Aluminum Extrusion and Insurance businesses. Prior to Werner Holding Co., he co-founded a technology company that developed proprietary products for the engineering workstation market. Early in his career he worked as an engineer for a Kleiner Perkins venture company.

Mr. Werner earned a B.S. degree in Mechanical Engineering and Engineering and Public Policy with honors from Carnegie-Mellon University. Having earned an IBM Fellowship, he graduated from Stanford University with a M.S. degree in Manufacturing Systems Engineering. Mr. Werner completed his M.S. Management degree at the MIT Sloan School.



Speaker: Renato Zanichelli | National Managing Partner, Tax Reporting & Advisory, Grant Thornton

Renato currently serves as the National Managing Partner of the firm's Tax Reporting & Advisory (T-RA) business line. He has over 20 years of public accounting and industry experience.

In addition to his client service responsibilities, Renato is responsible for the delivery of quality services, operational needs, and welfare of employees within the T-RA business line nationwide.

Renato has experience with public and private companies in a variety of industries. In his current role, Renato helps large multinational organizations manage global tax risk, meet regulatory requirements and achieve operational and strategic objectives. Areas of expertise include strategic tax function optimization and transformation, global tax risk management, tax controls advisory, and income tax accounting matters (ASC 740).

Renato's background includes driving tax saving initiatives as part of the tax function of a multinational public company. His experience has helped anticipate and understand his clients' needs and proactively offer sound solutions to potential obstacles.

Professional qualifications and memberships

- Investor Board member of the Gift of Adoption Fund
- Member of the American Institute of Certified Public Accountants
- Member Illinois Certified Public Accountants Society

Renato received his Bachelor of Science from DePaul University and his Master of Science of Taxation from Northern Illinois University.