



# TMA Great Lakes Conference

HOSTED BY TMA NORTHERN OHIO, DETRIOT, PITTSBURGH, & UPSTATE NEW YORK CHAPTERS

MAY 15 - 16 | THE GRAND RESORT | WARREN, OHIO

**JOIN US FOR NETWORKING, EDUCATION,  
GOLF, PICKLEBALL OR SPA**

THE GRAND RESORT  
—WARREN, OHIO—



**The Grand Resort**  
9519 E. Market Street  
Warren OH 44484

**Hosted by the Detroit, Northern Ohio, Pittsburgh and  
Upstate New York TMA Chapters**



# Great Lakes Conference 2025

## The Grand Resort

9519 E. Market St.  
Warren, OH 44484

**Hosted by the Detroit, Northern Ohio, Pittsburgh and  
Upstate New York TMA Chapters**

### Thursday, May 15, 2025

10:00 am - 6:00 pm	Conference Registration	Resort Lobby
10:00 am - 11:30 am	Golf Check-In (Boxed Lunch) Driving range will be open	Avalon Lakes Course
12:00 pm - 5:00 pm	Golf Outing (shotgun start)	Avalon Lakes Course
1:30 pm – 3:30 pm	Spa/Pickleball Clinic	
5:30 pm - 6:30 pm	Opening Reception	Grand Pavilion
6:30 pm - 8:00 pm	Dinner, Golf Prizes, Awards	Grand Pavilion
8:00 pm - ??	Cigar Bar & Networking	Grand Pavilion & Patio
10:00 pm	Networking II	The Rig

### Friday, May 16, 2025

8:00 am	Buffet Breakfast	Ballroom 1
8:15 am - 9:15 am	Keynote Speaker	Ballroom 1
9:15 am - 9:30 am	Coffee Break	Ballroom 1
9:30 am - 11:00 am	Industry Panel	Ballroom 1
11:00 am	Raffle Prizes - \$1,000 in Cash (must be present to win)	Ballroom 1

*\*A request for CLE credit may be made to the Supreme Court of Ohio Commission on CLE. CPE for accountants may also be available.*

## KEYNOTE SPEAKER



### D.J. Santiago

Transformational Leader, Executive Strategist, and Champion of Turnarounds DJ Santiago is a powerhouse in leadership, business strategy, and high-performance coaching. With a unique blend of athletic grit, executive insight, and an unwavering passion for empowering teams, DJ has spent his career transforming underperforming organizations into market leaders and helping individuals unlock their full potential. From the baseball field to the boardroom, DJ is a master of turnarounds.

His journey began as a professional athlete, where he honed his skills in competition, leadership, and resilience. These values became the foundation for Aspiring Athletes, founded in 2003, which has helped over 3,500 athletes chase their college and post-college dreams, generating over \$10 million in revenue and employing more than 60 individuals across six locations.

Transitioning seamlessly into the business world, DJ applied his coaching mindset to corporate turnarounds. At Oswald Companies, he earned Rookie of the Year honors with \$380,000 in first-year sales and exceeded sales goals by over 160% in the following years, achieving more than \$800,000 in gross sales within three years. At MAI Capital, as National Head of MAI Benefits, DJ built and led high-performing teams, spearheaded acquisitions, and ran the insurance division with precision and strategic foresight.

Currently, as a Client Executive at Hylant Insurance Group, DJ oversees key accounts and dives deep into the Minority Business Enterprise (MBE) space, positioning himself as a trusted advisor in risk management and strategic planning. His ability to blend client advocacy with business strategy makes him a go-to expert for complex challenges.

DJ's forthcoming book, *Risky Business: Coaching Business Leaders to Win the Game of Health Insurance*, offers business leaders a playbook for navigating health insurance complexities while maximizing value. This reflects his belief that great leaders are ultimately great coaches, guiding their teams to smarter, more strategic decisions.

# Great Lakes Conference 2025

## ‘The Future of Education’

*Dealing with Distress in Higher Ed*

### OUR PANELISTS



**David Levy**

**Keen-Summit Capital Partners/Summit Investment Management**

David Levy, CCIM, is managing director at Keen-Summit Capital Partners. He is head of Keen-Summit Capital Partners and Summit Investment Management's Chicago office, responsible for all aspects of business development and execution with the company's real estate brokerage and auction, lease modification, investment banking, and restructuring advisory services, plus distressed debt acquisitions and opportunistic credit transactions. Levy has more than 17 years of experience in real estate advisory and transaction experience, with expertise in workouts and bankruptcy.

He holds both the Certified Commercial Investment Member (CCIM) and Certified Auctioneers Institute (CAI) designations. He is the current President of TMA Chicago/Midwest Chapter, and the Special Projects Leader for Education Webinars for the American Bankruptcy Institute (ABI) Real Estate Committee.



**John Lane**

**Inglewood Associates**

John K. Lane is CEO/Managing Director of Inglewood Associates LLC, a turnaround, crises management and business/operations management consulting firm. With nearly fifty years of broad financial, management, operational, technical and international experiences John has run numerous companies as either a CEO, CRO, crisis manager or receiver. John led the engagement serving Lake Erie College and co-led the engagement serving Notre Dame College. In 2021 he was awarded the 2021 Lifetime Achievement Award and the 2016 Turnaround/Transaction of the Year by the TMA Northern Ohio Chapter.

John is a Certified Turnaround Professional (CTP) and a past president of the Ohio Chapter of TMA. He obtained a BBA at the University of Notre Dame.

## OUR PANELISTS



### **Ryan Gross** Getzler Henrich & Associates

Ryan Gross brings 10 years of experience and restructuring to Getzler Henrich. He specializes in providing turnaround and restructuring support services to distressed and underperforming companies and municipalities, as well as advising boards, management, and creditors.

Ryan has an MBA from John Carroll University and is a Certified Public Accountant. He is a member of the Michigan Association of Certified Public Accountants, American Institute of Certified Public Accountants, Turnaround Management Association (NextGen Board Member and President), American Bankruptcy Institute, Association of Insolvency and Restructuring Advisors, Association for Corporate Growth, and the Commercial Finance Association.



### **Sara Tewes** Bond Schoeneck King

Sara C. Temes is a member of Bond Schoeneck & King PLLC. Sara is a business restructuring, creditors' rights and bankruptcy attorney who concentrates her practice in a wide range of business restructuring and bankruptcy matters, including out-of-court workouts, cross-border insolvency cases and representations of debtors, creditors, creditors' committees, landlords, lenders and purchasers in cases filed under chapter 11 of the Bankruptcy Code.

She also advises senior managers and boards of directors of financially troubled companies, including higher education institutions, with respect to restructuring strategies.

Sara received her BA degree from Wellesley College in 2000 and her JD from the University of Pennsylvania Law School in 2003.

### **Moderated by**



### **Nancy Valentine** Miller Canfield



# Great Lakes Conference 2025

The Grand Resort 9519 E. Market St. Warren, OH 44484

## REGISTRATION FORM

Name: \_\_\_\_\_

Name for Badge: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

TMA Chapter: \_\_\_\_\_ TMA Member #: \_\_\_\_\_

Golfing:  Yes  No Handicap \_\_\_\_\_ (Required)

Choose Format:  4-Person Scramble  Best Ball  Either Format is OK

Pairing Requests (if any): \_\_\_\_\_

Pickleball Clinic:  Yes  No. (Spaces are limited.)

Spa Treatments:  Massage  Facial

### PAYMENT (See Fee Schedule on Next Page)

Conference Only \$\_\_\_\_\_ Conference & Golf \$\_\_\_\_\_ Conference & Pickle Ball \$\_\_\_\_\_  
Conference & Spa \$\_\_\_\_\_

\*Conference registration is required to golf.

Check enclosed – or –

Charge my Visa / MC / Amex #\_\_\_\_\_ Exp\_\_\_\_\_

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

Mail Completed Form & Payment To: TMA · Attn: Anna Goetz 2801 Custer Ave., Pittsburgh, PA 15227

## Registration

Registration Fees include educational sessions, meals, and social functions. Room charge is not included (see below). All registered attendees will receive a TMA name badge at the Conference that must be worn for admittance to all sessions, meals, and social functions. The member registration rate is for current, active TMA members.

Conference registration will close Thursday, May 8, 2025 at 12:00 am EST .

<u>Conference Only</u>	Before or On (May 1st)	After (May 1st)
Member	\$200	\$250
Non-member	\$300	\$350
NextGen	\$150	\$200

### Conference and Golf \*, Pickle Ball or Spa

Member with Golf	\$375	\$425
Non-member with Golf	\$425	\$475
NextGen with Golf	\$275	\$350

\*Conference registration is required in order to play golf.

For those wishing to register by mail, please complete the registration form. Registrations cannot be confirmed until payment is received. Please contact Anna Goetz, conference administrator, at [admin@tmaohio.org](mailto:admin@tmaohio.org) or 412.882.5383 x1168.

## Sponsorship

Due to a tremendous response to the sponsorship campaign, anyone interested in supporting this year's conference should immediately contact:

MJ Hilker, [mjhilker@aol.com](mailto:mjhilker@aol.com) – 440-734-4887

Joe Heim, Culain Capital, [jheim@culaincapital.com](mailto:jheim@culaincapital.com) – 716.919-1322

Paul Schapira, Genesis Capital Advisors, [pschapira68@gmail.com](mailto:pschapira68@gmail.com) – 248-760-7299

Mike Von Lehman, Meridian Management Partners, [mvonlehman@meridianmp.com](mailto:mvonlehman@meridianmp.com) · 412-251-4115

Jason Hanes, KeyBank Business Capital, [Jason\\_hanes@keybank.com](mailto:Jason_hanes@keybank.com) – 216-536-3422

## Cancellation Policy

The deadline to cancel for a refund will be 4:00PM on Friday, May 9th, 2025 (the "Cancellation Date"). No refunds will be granted after the Cancellation Date, but substitutions are welcomed. Please consider sending a colleague in your place should you need to cancel. The difference between member/non-member rates may be applicable. There will be no exceptions to the Cancellation Policy.

## Room Reservations and Driving Directions

Room Reservations: Please contact The Grand Resort directly at **330-856-1900** to book a room or book online [HERE](#). Please ask for the TMA Great Lakes conference rate of \$219 plus tax for a single room.

\*\*\*IMPORTANT\*\*\* Reservations must be made and guaranteed by a major credit card by May 2, 2025 to guarantee the discounted room rates.

Room Cancellation: Room cancellations must be made through The Grand Resort 5 days before your arrival to receive a refund. Cancellations after that date will be charged for one night.

## Attire

Golf (Men and Women): Collared shirts, no denim

Educational Sessions and Networking Events: Business Casual

## Chapter Presidents

### Northern Ohio

Michael Kaczka  
McDonald Hopkins  
600 Superior Ave E  
Cleveland OH 44114  
mkaczka@mcdonaldhopkins.com  
216-430-2028

### Upstate NY State

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Buffalo, NY 14202  
716-845-6446

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248-227-0978

### Pittsburgh

Aimee Rice  
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1001 Liberty Ave, Fifth Floor  
Pittsburgh, PA 15222  
aimee.rice@riveron.com  
412-216-9990

## 2025 TMA Great Lakes Conference Committee

Event Chair Sarah McIntosh, KIKO Auctioneers & Advisors

Sponsorship (Chair) MJ Hilker  
Jason Hanes, KeyBank Business Capital  
Paul Schapira, Genesis Capital Advisors  
Joe Heim, Culain Capital  
Michael T. Von Lehman, Meridian Management Partners

Education Committee Nancy Valentine, Miller Canfield  
Sarah McIntosh, KIKO Auctioneers & Advisors  
John Polinko, McDonald Hopkins  
Hugh Larratt-Smith, Tringingham  
Michael Kaczka, McDonald Hopkins

Event Administrator Anna Goetz - TMA Northern Ohio Chapter Administrator

The conference committee would like to acknowledge and extend a special thank you to the chapter executives for their assistance in organizing the 2025 TMA Great Lakes Conference.

Anna Goetz - Northern Ohio Chapter - (412)882-5383  
Amanda Rymiszewski - Detroit Chapter - (313) 910-5066  
Kelly Szejko - Pittsburgh Chapter - (412) 228-5885  
Kelly Walther - Upstate New York Chapter - (949) 238-0907



# Great Lakes Conference 2025

## KEYNOTE SPEAKER SPONSOR



## DIAMOND SPONSORS





# Great Lakes Conference 2023

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Dinner Dessert Sponsor



Friday Breakfast Sponsor



Golf Skill Sponsors



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