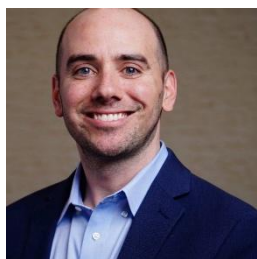


FORWARD FAMILY WEALTH SYMPOSIUM – SPEAKERS’ BIOS



Mark Adams

Mark is a Senior Manager within Deloitte & Touche LLP’s Cyber & Strategic Risk practice, with over 20 years of experience spanning threat intelligence, cyber risk, strategy & program leadership, and artificial intelligence (AI) risk and security. He brings a strong law enforcement foundation to this work, having served nearly a decade with the Federal Bureau of Investigation (FBI).

At Deloitte, Mark leads several Family Wealth Office cyber portfolios, supporting clients across strategy, maturity assessments, security tool implementation, policy development, incident response, and managed security operations. He has extensive experience helping organizations grow and mature their security programs, with a consistent focus on people, process, and technology.

In addition to his broader security leadership, Mark serves as a trusted Strategic Cybersecurity Advisor to Family Wealth Offices, providing guidance that directly shapes organizational strategy and resilience. He partners closely with C-suite leaders to develop multi-year roadmaps aligned with evolving business objectives. This includes guidance on AI governance and the security implications of adopting emerging technologies, translating complex risk landscapes into clear, actionable decisions for executive teams. Mark’s advisory work bridges strategic vision with hands-on program execution, helping his clients build durable resilience against an evolving threat environment.

Mark lives in Leesburg, Virginia with his wife and three children. Outside of the office he can usually be found at one of his children’s sporting events on the weekends.



David Bauer

Dave is a partner and Chief Investment Officer with Lubar & Co, a Milwaukee based single family office, since 2005. He is involved in the direct investing / private equity activities of the firm and is on the board or working closely with the portfolio of companies and investments including American Pasteurization, ChemDesign, Shared Imaging, Lake Express, Drilltec, Rockland Industrial Products, Star Group (ticker: SGU), Zero Zone as well as the firms real-estate investment holdings. Prior to this, he was the Chief Financial Officer for Facilitator Capital Fund, a Wisconsin-based Small Business Investment Company. He started his career with Arthur Andersen where he led the Wisconsin transaction advisory services practice.

Mr. Bauer received a Master of Business Administration degree from Marquette University in 2005 and a Bachelor of Science degree in Accounting in 1991. He is a Certified Public Accountant and a member of the Wisconsin Institute of CPAs and the American Institute of CPAs.

In addition, Mr. Bauer is actively involved with several local charitable organizations including the Sisters of the Divine Savior and is an adjunct professor of corporate finance at Marquette University in their Executive MBA program. He has two children and resides in Waukesha, WI with his wife, Heidi.



Rebecca Hartzel

Rebecca is a Managing Director and leader of Deloitte’s Private Wealth practice in Milwaukee. She has more than 25 years of experience advising affluent individuals and families, family offices, privately held companies, and business owners. Rebecca works with families across generations, providing tax compliance and consulting services related to partnerships, S corporations, individuals, fiduciaries, gifts, estates, and private foundations. She joined Deloitte in 2002 after beginning her career with Arthur Andersen. Rebecca is a member of the WICPA, AICPA, and Milwaukee Estate Planning Forum, and serves on the

Children’s Hospital of Wisconsin Planned Giving Council. She is also active in Deloitte’s national training programs, frequently speaks on tax topics throughout southeast Wisconsin, and is active at St. Gabriel Parish in Hubertus.

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Daniel Potter

Dan serves as Managing Director of Corporate and Shareholder Services for Michels Family Office. Drawing on more than 35 years of legal, public accounting, and industry experience, he brings to the Michels family the perspective gained from advising high net worth individuals, business owners, private companies, and multigenerational families on complex tax, succession, and wealth transfer matters.

Throughout his career, Dan has helped clients develop strategies for wealth preservation and growth, business succession, retirement planning, and the efficient transfer of assets across generations. His areas of expertise include S corporation and partnership taxation, trust and individual income taxation, estate, gift, and generation-skipping transfer tax planning, business succession planning, charitable giving, and private foundations.

In his role with Michels Family Office, Dan applies this extensive experience to support the corporate, shareholder, tax, estate planning, and family governance needs of the Michels family and its related entities.

Throughout his career, Dan has also served as adjunct faculty and has held numerous technical leadership positions, contributing to the education of professionals and clients in the areas of taxation, estate planning, business succession, and wealth transfer planning.



William Schleicher

Bill is President and Chief Operating Officer of GCI, an investment company focused on providing capital to developing companies. As part of his responsibilities at GCI, Bill serves as a board member for each of the company’s investments and works closely with their leadership teams to identify and develop strategic opportunities.

Prior to joining GCI in 1991, Bill worked at Arthur Andersen, where he gained experience in public reporting, internal controls, and securities regulatory requirements for large, publicly held companies. He also worked with entrepreneurs across a variety of small businesses, helping them develop strategic plans, accounting systems, and financial controls.

In addition to his responsibilities at GCI, Bill provides oversight and management of the Comer family’s investment portfolios and trusts, family assets, and financial planning. He serves as a board member of the Comer Science and Education Foundation and the Chicago Fund and actively participates in the Comer family’s philanthropic activities. Bill is a graduate of the University of Wisconsin–Whitewater and is a Certified Public Accountant.



Timothy Steffen

As Director of Advanced Planning for Baird, Tim is responsible for researching, writing and speaking on important planning issues that impact the clients of Baird. This includes topics related to retirement and estate planning, tax law, executive compensation, business owners, legislative changes, and overall best practices.

Tim originally joined Baird in 1999 serving in a variety of planning-oriented roles. He left Baird in 2019 to join the Advisor Education team at PIMCO, before returning to Baird in 2021. Prior to 1999, Tim worked in Arthur Andersen’s Private Client Services group in Milwaukee where he specialized in tax and financial planning. His clients included corporate executives, business owners and families.

Tim earned his bachelor’s degree in Accounting from the University of Illinois in 1991. He is a Certified Public Accountant/Personal Financial Specialist, a CERTIFIED FINANCIAL PLANNER™ professional, a Certified Private Wealth AdvisorSM professional and a member of the American and Wisconsin Institutes of CPAs, Investments & Wealth Institute (IWI) and the Financial Planning Association (FPA).

FORWARD FAMILY WEALTH SYMPOSIUM – SPEAKERS’ BIOS



Tony Tagliapietra

Tony is a 25-year plus veteran in the financial services industry. He started municipal bonds at Baird in 1999 and transitioned to equities in 2001. Tony spent 18 years as an institutional equity trader investing for the world’s largest Hedge Funds and Mutual Funds. In 2019 he became a CIO for a large Wisconsin family office focusing on public and private investing. Tony has a Finance and Marketing degree from University of Wisconsin-Milwaukee. He has a wife, three children and very active coaching his children’s sports over the years.



Timothy Voigtman

Timothy is a partner and business lawyer practicing with Foley & Lardner LLP and serves as Co-Chair of the firm’s Tax, Benefits & Estate Planning Practice.

Tim practices general corporate and tax law, including the business and tax consequences of the formation, ownership, operation, sale, and reorganization of C corporations, S corporations, partnerships, and limited liability companies. Tim also advises clients on executive compensation matters such as stock options, profits interests, golden parachutes, and non-qualified deferred compensation arrangements. Tim is a member of the firm’s Taxation and Employee Benefits & Executive Compensation Practices and Food & Beverage Industry Team. Tim also co-founded the firm’s Family Office Team, and has extensive experience with independent family offices and businesses that provide family office functions internally. Tim provides guidance on succession planning and governance issues for closely held and family held businesses.