

Biographies

Jim Katherman, CPA, Haskell & White

Jim Katherman, CPA has over 40 years in public accounting, specializing in income tax planning, tax and business consultation, and tax returns for individuals, businesses, and trusts. Prior to joining Haskell & White, he founded and operated his own firm, Katherman Kitts, and previously served at a large regional firm as a partner before starting his own firm. Jim provides accounting, tax and business advisory services for a diverse group of clients doing business, living and working in the U.S., Asia, and Europe. In 2017, Katherman Kitts & Co combined their practice with Haskell & White to bring additional services to clients and growth opportunities for the Katherman Kitts team. He has extensive experience in the tax aspects of structuring business acquisitions and sales, and in the U.S. tax reporting for international business and investment. Jim works with many different business entity structures including corporations, LLCs/partnerships, and trusts.

Jim Krenn, Partner, Morrison & Foerster LLP

Jim Krenn has extensive experience representing private and public companies and investors in significant business transactions from formation through liquidity. His practice focuses on mergers and acquisitions, venture capital financings, and emerging company counseling. Mr. Krenn advises clients on acquisitions on both the buy-side and sell-side across numerous transaction structures, including equity purchases, asset purchases, mergers, acquisitions and divestitures of divisions and subsidiaries, cross-border transactions, and auctions. He has represented buyers and sellers in acquisitions and divestitures ranging from \$1 million to over \$1 billion. Mr. Krenn also counsels emerging and established companies in equity financings and general corporate matters, and angel, corporate, and venture capital investors in investments in such companies. Mr. Krenn has represented clients in over \$2 billion in equity and debt financings ranging from seed rounds to \$100 million plus later stage rounds. In addition, Mr. Krenn represents public companies in public offerings, other capital markets transactions, and SEC reporting and compliance matters, and advises boards of directors on corporate governance issues. Mr. Krenn received his J.D., cum laude, from Harvard Law School and his B.B.A., summa cum laude, in finance from the University of Notre Dame.

Carlos Martinez, Principal, Haskell & White

Carlos Martinez is a principal in our Audit and Business Advisory Services Group. Carlos has more than 15 years of accounting and auditing experience. Carlos' areas of expertise include financial accounting and reporting, compliance, auditing, internal control reviews and operational efficiency opportunities, as well as assisting clients on mergers, acquisitions, leveraged buy-outs and recapitalizations. He also has extensive expertise working with private equity groups and serving their portfolio companies. Carlos spent two years in North Carolina working at one of the nation's largest accounting firms, returning in 2014 to San Diego where he began his career in public accounting after graduating with a bachelor's degree in business administration with an emphasis in accounting from San Diego State University. He is a member of the AICPA and the CalCPA. Carlos is active in the San Diego community through his involvement in organizations such as the Association for Corporate Growth and Corporate Directors' Forum.

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Kirk Michie, *Financial Advisor, Bernstein*

Kirk Michie is a Vice President and Financial Advisor in the San Diego office of Bernstein. He has extensive experience advising private clients and institutions, as well as their respective trusts, estates, foundations, endowments and pension plans on matters related to wealth management and the capital markets, including tax and estate planning, concentrated stock positions, and the sale of privately held businesses. Prior to rejoining the firm in 2014, Michie was, most recently, a partner and head of fund raising and investor relations with Triton Pacific Capital Partners. Earlier he was founder and managing member of Candor Advisors, a wealth management think tank. Before that he was managing director of Lenox Advisors; prior to that he was director of marketing and client service at Osborne Partners Capital Management and earlier he was senior vice president with Wells Fargo Advisors; and prior to that he was head of the private client business of Kayne Anderson. From 1993 to 1998 he was a Financial Advisor with Bernstein and helped build the San Diego business. Michie earned a BS in finance from the University of Southern California. He is involved in a number of causes related to activism and life improvement.

Stefan Okhuysen, *Head, CVF Capital Partners*

Stefan Okhuysen is a Principal and heads the San Diego office at CVF Capital Partners, a Private Equity and Mezzanine Financing fund focused on lower middle-market transactions. He has 15 years of investment, investment management and operational experience and has either led or participated in transactions in several sectors, including logistics, manufacturing, healthcare, business services, education, food and beverage, and retail. He has sat on a number of boards in these sectors, either as a member or advisor in both the U.S. and Mexico. Mr. Okhuysen joined CVF in 2011 but, between 2013 and 2016, he served as Vice President at Tresalia Capital's Private Equity team, where he led and participated in several transactions throughout the U.S. and Mexico. Prior to transitioning into Private Equity, Mr. Okhuysen was founder and CEO of SOU Group, a Los Angeles-based imports and distribution company. Previously, he worked at Banco Santander Suisse's Asset Management division in Geneva, Switzerland, as a Fixed Income Analyst. Stefan received an M.B.A. from the Kellogg School of Management at Northwestern University and a B.A. in Financial Management from Tec de Monterrey.