

NORTH CAROLINA OUTWARD VIRTUAL TRADE MISSION

MAY 2021



SNABC
Scottish North American
Business Council

 **Lochaber
Chamber of
Commerce**
WORKING FOR BUSINESS IN THE
OUTDOOR CAPITAL OF THE UK

MARKET AWARENESS SESSION

Tuesday 18 May 2021

10am NC / 3pm UK time - 12 noon NC /
5pm UK time

Scheduled Zoom meeting.

Join Zoom Meeting

[https://us02web.zoom.us/j/83066049872
?pwd=My9XdGx6aHlyalJxSTBPYjE4a29lZz09](https://us02web.zoom.us/j/83066049872?pwd=My9XdGx6aHlyalJxSTBPYjE4a29lZz09)

Meeting ID: 830 6604 9872

Passcode: 264981

Introduction and Welcome to the Mission

LCOC, SNABC, BABC Carolinas and Triangle BABCNC

Welcome: Andrew Staunton, UK Consul General, Atlanta

Welcome: Elaine Marshall, NC Secretary of State

North Carolina Overview of Key Sectors and Regions:

Colin Kiser, International Business Development Manager, Economic Development Partnership of North Carolina

Research Triangle Region Overview:

Ryan Combs, Executive Director, Research Triangle Regional Partnership

Charlotte Region Overview

Sven Gerzer, VP Business Recruitment, Charlotte Business Alliance

Panel Discussion: EDNPC, RTRP, Charlotte, NC East Alliance

Allan Hogarth, Executive Director, SNABC (Moderator)

Colin Kiser, EDPNC

Ryan Combs, RTRP

Sven Gerzer, Charlotte Business Alliance

Trey Goodson, Regional Economic Developer, NC East Alliance

North Carolina-Scottish Cultural Relationships:

Mike McIntyre, Senior Advisor for Government Relations and Economic Development, Ward and Smith

Keith Burns, Member, Raleigh Office Managing Partner, Nexsen Pruet

SECTOR SPECIFIC PANEL DISCUSSION

Wednesday 19 May 2021

**10am NC / 3pm UK time - 11:15am NC
/ 4:15pm UK time**

Scheduled Zoom meeting.

Join Zoom Meeting

<https://us02web.zoom.us/j/83705801650?pwd=NDhtRlZmNUtDdm14dmN1OVY3cUtNZz09>

Meeting ID: 837 0580 1650

Passcode: 715659

Introduction and Welcome

LCOC and SNABC

Life Sciences/Healthcare Panel Discussion

Steve Cain, President, Triangle BABC (Moderator)

Doug Edgeton, President & CEO, NC Biotech Center

Brad Walters MD PhD MBA, VP & Chief Medical Officer (retired), RTI International

LaQuinta Jernigan, EVP North America, mdgroup

Elizabeth Davies, VP Payer Marketing, GSK

Tech/FinTech Panel Discussion

Sarah Peeler, Executive Director, BABC Carolinas (Moderator)

Brooks Raiford, President & CEO, NC Tech Association

Chris Shaw, CEO, Ten10

Dan Roselli, Co-Founder and Managing Director, Queen City Fintech/Packard Place/RevTech Labs

15 min break before next session with new zoom login details

LEGAL & FINANCIAL ISSUES TO CONSIDER

Wednesday 19 May 2021

11:30am NC / 4:30pm UK time - 12:30pm
NC / 5:30pm UK time

Scheduled Zoom meeting.

Join Zoom Meeting

[https://us02web.zoom.us/j/8469761662
2?pwd=YVR4M2UrLzhjTVkzSWMxL3VibE
N4QT09](https://us02web.zoom.us/j/84697616622?pwd=YVR4M2UrLzhjTVkzSWMxL3VibEN4QT09)

Meeting ID: 846 9761 6622

Passcode: 497550

Welcome
LCOC and SNABC

Legal Issues to Consider:
Patrick Strubbe, Partner, Womble Bond Dickinson

Financial / Tax Issues to Consider:
Sherri York, Partner, RSM US

CLOSING SESSION

Thursday 20 May 2021

10am NC / 3pm UK time - 10:45am NC /
3:45pm UK time

Scheduled Zoom meeting.

Join Zoom Meeting

[https://us02web.zoom.us/j/83522690698?
pwd=U0hvbktlUXU3SGpiQ2R4ZWxXRzA5Q
T09](https://us02web.zoom.us/j/83522690698?pwd=U0hvbktlUXU3SGpiQ2R4ZWxXRzA5QT09)

Meeting ID: 835 2269 0698

Passcode: 620921

Welcome
LCOC and SNABC

America Made Easy:
Frank Levene, Independent Director, Avitus Group

Feedback from delegates

Thanks from LCOC and SNABC

Frazer Coupland, CEO, Lochaber Chamber of Commerce

Frazer has been in post as CEO at Lochaber Chamber of Commerce since February 2019, having previously worked as Destination Manager promoting the Outdoor Capital of the UK as Scotland premier destination to enjoy the outdoors.

Frazer first came to Lochaber in 1969, in 1981 he joined the Royal Navy. In 2005 having travelled extensively, involving a variety of jobs (predominantly in adventure tourism) he set up No Fuss Events in 2005, an outdoor adventure sports events company.

Having been an employee and a director of Lochaber Chamber, he seized the opportunity to apply and then become CEO when the position became available in late 2018.

Eilidh MacDonald, International Trade and Office Manager, Lochaber Chamber of Commerce

Eilidh joined Lochaber Chamber of Commerce in 2019 as Office Manager and has since then taken up the opportunity to also lead on International Trade missions for the Chamber.

Eilidh started her career in 1995 where she worked in the print industry for 14 years working her way up from Office Junior to Estimating Manager, the company ceased trading in 2008 and from there she worked as Duty Manager at a local hotel for 5 years managing and developing frontline operations and setting up all aspects of administrative duties in the hotel.

Eilidh also worked for 5 years at her local Council supporting Lead Professionals and dealing daily with highly sensitive child protection matters.

Allan Hogarth, Exec Director of the Scottish North American Business Council

Prior to working at the SNABC, Allan was director of Public Affairs for a leading consultancy and spent 8 years with CBI Scotland, latterly as Head of Media and Public Affairs. He also worked as the director of the British Lung Foundation in Scotland, establishing it as a leading medical research charity.

He has extensive experience in media relations and public affairs, is a member of the GlobalScot Network, and has served on a wide range of Scottish Government Steering Groups, including the Scottish Education Awards, the Scottish International Forum, the Fresh Talent Steering Group and Review of Planning in Scotland. He has also acted as an advisor to the MSc PR course at the University of Stirling.



Steve Cain, President, Triangle British American Business Council

Steve is a pharmaceutical commercial strategy expert with a 30-year track record of achievement in the global pharmaceutical industry.

Steve was with GlaxoSmithKline for more than 20 years, most recently as Head of Global Product Strategy Operations within R&D. Since leaving GSK, he has established his own life sciences consultancy, Psscion LLC, focused on delivering marketing, commercialization strategy and corporate development services for pharmaceutical, biotech and medical technology companies.

Sarah Peeler, Executive Director, British American Business Council Carolinas

Sarah, a British citizen and U.S. permanent resident, has lived in the United States for 28 years. With a background in marketing and public relations, Sarah spent over 15 years in various corporate roles leading marketing research, planning and development, public relations and corporate communications, RFP/RFQ management and business development in the professional services market sector.

Since 2009, she has worked as a consultant, providing association and corporate board member expertise for several non-profits and international business organizations, before joining the British American Business Council Carolinas as their Executive Director in 2013.

Andrew Staunton, Her Majesty's Consul General

Andrew took up his appointment in Atlanta as Her Majesty's Consul General in June 2018. Andrew is the senior UK government representative in the Southeast United States responsible for relations with the states of Georgia, Tennessee, North Carolina, South Carolina, Mississippi and Alabama. He leads a team which works to promote UK-US trade and investment, support British nationals, conduct public diplomacy on key issues, and build scientific and research co-operation. He also sits on the Marshall Scholarship selection committee.

Before taking up his posting in Atlanta, Andrew served four years as Deputy Head of Mission and Economic Counsellor at the British Embassy in Athens. He was also Deputy Head of Mission at the British Embassy in Dublin from 2009 to 2013.

Throughout both of these postings, Andrew's main focus was on the economic crisis in Greece and Ireland, boosting bilateral relations, promoting the UK's interests, and working on a range of issues linked to the European Union. Prior to this, Andrew worked in the Foreign Office as Deputy Director responsible for Security.

Andrew joined the UK's diplomatic service in 1987. He has also served overseas in China, France, Romania and Canada. Andrew was born in Glasgow, Scotland. He is accompanied in Atlanta by his wife, Rebecca. They have two adult children, both living in the UK.

Elaine F. Marshall, Secretary of State of North Carolina



In 1996, Secretary of State Elaine F. Marshall became the first woman ever elected to a state-wide, executive branch office in North Carolina.

Secretary Marshall was a member of the NC State Senate before rising to state-wide office. She holds a B.S. in Home Economics from the University of Maryland and a law degree from Campbell University. She has received Honorary Doctorate Degrees from Campbell University, Lees-McRae College, Meredith College and the Republic of Moldova State University of Medicine.

Her work experiences include teaching Home Economics in the public school and community college systems, co-ownership of a book and gift store, establishing an interior decorating business and the private practice of law.

Secretary Marshall has been very active in many civic groups in the areas of child welfare, women's issues, and agriculture and small-town economic development.

Since becoming Secretary of State, she has received numerous state and national awards for leadership in technology, government innovation, and women's leadership.

These awards include:

- The NC Bar Association's 2020 Chief Justice I. Beverly Lake Jr. Public Service Award honouring exceptional attorneys practicing in North Carolina who've contributed to the community with exemplary public service. Secretary Marshall is the first woman to receive the Lake Public Service Award.
- 2019 Brand Protection Hero Award from the Centre for Anti-Counterfeiting and Product Protection (A-CAPP).
- 2018 Person of the Year Award from The Women's Business Centre of North Carolina.
- 2018 Inductee to the North Carolina Women Business Owners Hall of Fame.
- The 2017 International Trade Lifetime Achievement Award from the Charlotte Business Journal.
- The 2017 Woman of Achievement Award from Meredith College.
- Leadership North Carolina's 2016 Governor's Award for public service and commitment to developing leaders.
- U.S. Department of State's Office of International Visitors Certificate of Appreciation, 2016.
- President of the National Association of Secretaries of State, 2015.
- Campbell University's 2014 Distinguished Alumni Award.
- Induction into the National 4-H Hall of Fame, Class of 2014.
- The 2014 Public Policy Leader of the Year Award from the National Association of Women Business Owners, Charlotte.
- The North Carolina 4-H Lifetime Achievement Award.
- The National Foundation for Women Legislators 2013 Elected Women of Excellence Award.
- Named to the Triangle's 100 Most Influential Business Leaders of 2012 list by Triangle Business Journal.
- The Moldovan Order of Honour, the highest distinction Moldova awards to non-Moldovan citizens.
- The Distinguished Attorney Award from the NC Association of Women Attorneys. She was the second person ever to be honoured with this award.
- Induction into the Honour Society of Agriculture of N.C. State University.

- Leadership awards from Common Cause North Carolina, the NCAE and the Delta Kappa Gamma Society.
- The Lifetime Achievement Award for Women in Business by the Triangle Business Journal.
- Named to National Notary Magazine's list of "The 50 Most Influential People in Notarization in the Last 50 Years".
- Served as President of the National Electronic Commerce Coordinating Council, a think tank dedicated to bringing best technology practices to government across this country.
- Recognized leader in state Trademark protection by the US Chamber of Commerce, the International Anti-Counterfeiting Coalition and Underwriters Laboratories.
- And Secretary Marshall has even received an official "Gold Record" from the Recording Industry Association of America for her law enforcement work to protect Trademarked goods and patent holders, as well as being named an honorary member of the Royal Canadian Mounted Police for trademark protection!

She is married to Jessie Thomas Bunn.

Colin Kiser, International Business Development Manager, Economic Development Partnership of North Carolina.

Originally from Virginia, Colin attended college in South Carolina, achieving his B.A. from Columbia International University.

Colin joined the EDPNC team in 2016, beginning as a Business Recruitment Manager where he learned the process of recruiting companies to North Carolina from start to finish.

Having come from a private industry sales background, results have always been a focus in his work for EDPNC. After almost three years in recruitment, Colin developed an affinity for serving international clients and working with them in their site selection decisions.

This prompted his move to the Business Development team in 2018, where he now oversees and manages the European and India Foreign Direct Investment offices and initiatives. Customer service and strategic results are core to Colin's professional philosophy as he advises international firms on their next investment into the US.

Colin lives in Raleigh, NC with his wife and two children. On weekends, you can find him hiking or playing soccer.

Ryan Combs, Executive Director of Research Triangle Regional Partnership

Ryan Combs is the Executive Director of Research Triangle Regional Partnership. Ryan works closely with economic development organizations in each of RTRP's member countries to market the competitive advantages of the North Carolina Research Triangle Region to potential investors.

Ryan joined RTRP from the NC Department of Public Safety where he served as Legislative Director for the Department's Government Affairs Initiatives.

Previously, Ryan served eight years on U.S. Senator Richard Burr's staff as a field representative. Through his experiences he has developed close relationships with business and community leaders to learn about and address important issues facing Communities.





Sven Gerzer Vice President Economic Development Europe, India & North America

Sven's responsibilities as an economic recruiter are focused on foreign direct investment attraction from Europe and India as well as working with North American and domestic projects. Services include location marketing and attraction, client and project management, business location consulting and site selection, negotiation of financial incentives and transaction agreements, human resource development and recruiting, arranging professional services for investors, and interfacing between the investor and the state and local governments.

Sven has ten years of experience in lead and project generation for rural communities paired with over six years of urban and high growth economic development.

Sven joined the Charlotte Regional Business Alliance (former Charlotte Chamber of Commerce) in September 2012. Prior to joining the Alliance, Sven held the post of managing director of the State of West Virginia European Office in Munich, Germany and has worked in economic development and FDI attraction to the United States for more than 16 years. Since joining the Charlotte Alliance, Sven has been responsible for more than 100 announced projects creating more than 8,300 jobs and \$600 million in investment including 65 European projects.

During his tenure with the Charlotte Alliance and the West Virginia European Office, Sven has developed a strong network of lead sources across Europe and India as well as in the United States. Sven organizes investment seminars across Europe on a regular level, involving many local partners, including US Embassies, local Chambers of Commerce, industry associations, and private sector multipliers, such as logistics companies, law firms, CPAs, recruiting firms, insurance companies and banks. He also served as vice president of the Council of American States in Europe (predecessor to SelectUSA in Europe), representing the interests of all American states in Europe with national, regional and local governments and private sector associations. Sven is on the board of the German-American Chamber of Commerce Carolinas Chapter; American Council on Germany North Carolina Chapter; the Deutsche Schule Charlotte (German School Charlotte) and was appointed by the Charlotte City Council to serve on the City of Charlotte International Cabinet.

Sven is a native of Munich, Germany and holds a Bachelor's and a Master's degree in International Studies from the University of South Carolina. He has lived in Germany, the United Kingdom and the United States; is bilingual in German and English, proficient in French, and has family in India, Germany and the United States.

Trey Goodson, Regional Economic Developer, NC East Alliance

Trey Goodson is a native of eastern NC, born and raised in Greenville. He graduated from East Carolina University in May 2018 with a Bachelor of Science in Management with a concentration in International Business and a minor in German.

Trey started with NC East Alliance as an intern in January 2018 where he assisted in prospective company research and Marketing. Trey joined NC East in June 2019 full time. He now manages NC East social media and marketing as well as serving as the contact for prospective companies interested in the region.



Mike McIntyre, Attorney, Ward and Smith, Former Member of Congress



Mike is a former US Congressman and a leader in NC Scottish heritage events and Scottish-American Relations.

He served as the Co-Founder and Co-Chairman of the Congressional Friends of Scotland Caucus while he served in Congress.

Through his current law practice, he is a senior advisor for Government Relations and Economic Development and as an active member of the North Carolina Economic Development Association, Mike regularly works on Economic Development projects and has served on the board of the South Eastern Partnership, which serves South Eastern North Carolina, where the highest concentration of Scottish immigration occurred when the Scottish families originally came to America.

Keith Burns, Member, Raleigh Office Managing Partner, Nexsen Pruet



Keith is a real estate attorney in Raleigh-Durham, where he represents clients in matters involving lending, business transactions and general contracts.

He is particularly experienced in delivering counsel on original loans, refinances, and restructuring; the formation of LLCs, corporations, and partnerships; and real estate purchases, leases, supplier and customer contracts, acquisitions, and dissolutions.

In his 20+ years of experience practicing law, he has developed a firm belief that the difference between good and great outcomes lies at the intersection of details and business goals.

My legal strategies reflect that philosophy of meticulousness combined with pursuit of practical solutions and my record further underscores my fine-tuned approach to helping clients mitigate risk and capture return.

Doug Edgeton, President and CEO NCBiotechnology Centre



Doug became NCBiotech's president and CEO of NCBiotech in September 2014. He brings extensive executive-level experience in health care from major academic medical centers, research park development and business administration, including an emphasis on community service.

Throughout his career, Doug has managed both human resources (talent) and facilities, helping them work in concert to create the right ecosystem for organizational growth. This approach led to more efficient organizations, faster technology transfer and better patient care. Edgeton continues this transformative approach at the Biotech Center, targeting state investment and staff expertise to help North Carolina's life science companies grow, create jobs, and bring life-changing technologies to market.

At Wake Forest University, Edgeton held senior executive, administrative and financial roles with the medical school and Health System. Early in his tenure, he and his team developed a strategic planning process and implemented business management principles for the medical school. This laid the business case for the Piedmont Triad Research Park and eventually the integration of Wake Forest's medical school and North Carolina Baptist Hospital.

He directed development of the 230-acre PTRP and was named president of what is now Wake Forest Innovation Quarter. This included managing from concept-to-completion the renovation of two tobacco production facilities into Wake Forest Biotech Place, completed in 2012. The public-private partnership between the university, the city of Winston-Salem, the state of North Carolina and the federal government created cutting-edge research space and incubator facilities for start-up companies.

Edgeton's influence was also strong in the evolution of Wake Forest University Health Sciences and North Carolina Baptist Hospital into one organization with a single CEO. Edgeton co-led the two teams that worked out strategic, logistical and operational details of the reorganization. After the reorganization, he worked to combine the executive teams from the two separate entities, hiring key staff to complete the team.

Following those successes at Wake Forest, he joined NCBiotech in 2012 as senior vice president for financial planning and development.

Prior to joining Wake Forest, Edgeton served as associate dean for administration and finance at the University of Alabama School of Medicine at UAB.

Edgeton received his B.S. degree from the University of Alabama in Tuscaloosa, and MBA and MPH degrees from UAB. Edgeton lives in Raleigh with his wife. They have two adult children.

Bradford B. Walters, MD PhD MBA, VP & Chief Medical Officer (retired), RTI International



After earning his AB at Harvard College, his PhD at University College London as a Marshall Scholar, and his MD at Harvard Medical School, Dr. Walters did a surgical internship at Johns Hopkins Hospital and a neurological surgery residency at the Massachusetts General Hospital. He then joined the faculty of the University of North Carolina (UNC) at Chapel Hill School of Medicine, where he established the radiosurgery and epilepsy surgery programs.

Dr. Walters completed his MBA at the UNC Kenan-Flagler Business School and then joined Academy Funds, a pre-seed and seed stage venture capital firm specializing in the commercialization of intellectual property based on university research.

From 1999 through 2006, he served as a member of the board of directors of North Carolina Healthcare Information and Communications Alliance. In 2014 and 2015 he served on the North Carolina Board of Science and Technology.

While at RTI International from 2007 through 2019, as Chief Medical Officer a primary responsibility of his was to help shepherd RTI's internal drug candidates into clinical trials; over his career he has helped bring three new chemical entities through the Investigational New Drug process of the FDA into five Phase 1 trials. Having retired from RTI, he now continues as an external consultant to projects across the Institute. He remains an independent life sciences consultant, focusing on Phase 1 and Phase 2 projects.

Dr. Walters continues to serve on the Committee for the Protection of the Rights of Human Subjects at UNC-Chapel Hill and on the WCG IRB. He also remains the original Chief Medical Officer of the Medical Technology Enterprise Consortium (MTEC), a 501(c)(3) biomedical technology consortium, collaborating under an Other Transaction Agreement (OTA) with the U.S. Army Medical Research and Development Command (USAMRDC).



LaQuinta Jernigan, Executive Vice President, North America, mdgroup

As Executive Vice President (Americas) at **mdgroup**, LaQuinta has over 10 years of experience within the clinical trial industry, from planning educational events for healthcare professionals to supporting sponsors and CROs with solutions for decentralizing their clinical trials and expanding access to diverse communities.

LaQuinta's interest is in delivering digital health solutions and retention programs that tackle the growing burden of patient dropouts in clinical trials, ensuring our clients get their product to market in time and within budget, all while putting the patient first.

mdgroup is a global digital and patient health services company, pioneering a patient-first approach to clinical research. We combine our clinical trial and patient support expertise with cutting edge technologies to support patients throughout the entire clinical journey.

Our products and services have been developed patient-first, targeting the specific reasons patients cite for dropping out of a clinical trial. From travel issues to inconvenient locations to delays with expense reimbursement, we have evolved to meet the needs of patients around the globe.

Elizabeth Davies, Vice President, Payer Marketing, GSK



In her role, Elizabeth oversees Payer Marketing across the GSK portfolio including Respiratory, Oncology, Specialty, and Vaccines, and early-phase assets. In this role, she is responsible for the access and reimbursement strategy for launch and continued positioning of the drugs. Elizabeth works closely with the brand teams to ensure patient access to therapy within a complex healthcare environment.

Prior to joining GSK, she worked at Xcenda, a healthcare consulting company, advising specialty pharmaceutical and biotechnology clients on strategic initiatives related to market access, reimbursement, and health policy.

She has spent her career working with specialty products in a variety of disease state areas including immunology, rheumatology, respiratory biologics, oncology, and several orphan and ultra-orphan conditions. Elizabeth brings over 15 years of industry experience to the role.



Brooks Raiford, President and CEO, NC Tech Association

Brooks Raiford has served as President + CEO of the North Carolina Technology Association since 2008. NC TECH is the state-wide industry association for the tech sector, representing over 700 member companies and organizations that collectively employ over 200,000 North Carolinians.

In the early 1990s, he served as a policy aide to the Governor of North Carolina Office, where a key focus area was information technology and its impact on a variety of public policy areas. Subsequently, he held executive positions in North Carolina's non-profit and business sectors.

Brooks' current and recent leadership activities include serving as an appointee of the Chief Justice of the North Carolina Supreme Court to the North Carolina Commission on the Administration of Law and Justice; Vice Chair (and US Policy Chair) of the Board of Directors of the Technology Councils of North America; the North Carolina Advisory Committee of the US Global Leadership Coalition; the Corporate Advisory Board of the Independent College Fund of North Carolina; the Board of Trustees of Guilford College; and President of the Dean's Advisory Board for the College of Humanities and Social Sciences at NC State University, where he is a former Student Body President and University Trustee.

Brooks' wife Stephanie is a Principal in the Wake County Public School System, and they have two children, Lauren and Will.



Chris Shaw, CEO, Ten10

Chris is the CEO of Ten10, a leading independent Quality Engineering, Software Testing, DevOps and RPA consultancy. He is a professional MD / CEO with 20 years board experience in digital, software, professional services and outsourcing businesses from SMEs to FTSE100. Before Ten10, Chris spent 15 years managing several technology professional services businesses at Capita plc, the UK's largest business process outsourcing firm.

In late 2019, Chris led the incorporation of Ten10 in the USA, based in North Carolina. In October 2020, he managed the sale of the business to UK mid-market private equity investor, Graphite Capital.

Chris is a strong leader in challenging environments requiring energy, an ability to multi-task combined with maintaining an eye for detail, exercising pragmatism and taking the team with him. He has experience of turn-around, organic growth, new service, acquisition and transformation situations and is focused on staff engagement and customer satisfaction.

He has a strong track record of acquisitions from target identification to due diligence, deal closure, integration and driving successful outcomes to meet the objectives of PLC, PE and VC stakeholders. Chris has proven capabilities including strategy, proposition development, sales, service delivery, P&L management and building teams to deliver ambitious outcomes.



Dan Roselli, Co-Founder at Queen City Fintech

I know more about M&M's and Tequila than any human being you have ever met.

Rare blend of Fortune 500 experience with successful entrepreneurial track record. Fortune 500 marketing experience with General Mills, Colgate, M&M's, Bank of America. Youngest member in the history of the Bank of America operating committee.

Co-Founded 3 separate companies that made it to the Inc 500 Magazine list of fastest growing private companies in America.

Co-Founded one the largest and most successful entrepreneurship and tech hubs in the world.

I believe in Social Entrepreneurship, Conscious Capitalism and the power for the free market to change the world.

Patrick Strubbe, Partner, Womble Bond Dickinson



Patrick serves as a trusted advisor who provides corporate and financing solutions to both international and domestic companies. He brings over eight years of prior business experience to his law practice.

As a member of the Corporate & Securities Group and the Global Business Team, Patrick represents corporate clients, private equity groups and venture capital funds on various complex and cross-border business transactions, including:

- Mergers and acquisitions
- Stock and asset purchases
- Recapitalizations
- Joint ventures
- Strategic corporate transactions, and corporate finance.

In addition to handling a wide variety of business transactions, Patrick advises companies on general corporate law, company formation, corporate governance matters and complex commercial contracts. He has counselled clients across many industry sectors, including technology, manufacturing, retail and consumer, financial services and healthcare.

In the corporate finance arena, Patrick has significant experience representing borrowers, acquirers, issuers and lenders in a variety of syndicated, club and bilateral financing arrangements, including first and second lien structured facilities, investment grade financings, leveraged acquisition financings, mezzanine financings, and multicurrency and cross-border collateral facilities. Patrick also serves as a thought leader for the Firm's LIBOR Transition Team and assists clients in preparing for the shift away from LIBOR. In addition, he represents lenders in international project finance matters.

Prior to entering private practice, Patrick clerked on the United States Court of Appeals for the Seventh Circuit for the Honourable Michael S. Kanne.

In the community, Patrick serves on the Board of Directors of LIFESPAN, a North Carolina non-profit organization that empowers children and adults with development disabilities.

Sherri York, Partner, State and Local Tax RSM



Sherri is RSM's national state and local compliance leader and the partner-in-charge of the state and local tax practice for the Southeast region. Her experience includes income and franchise tax consulting and compliance, statutory tax credits, discretionary incentives, property tax, unclaimed property and sales/use tax. She serves a broad range of companies including insurance companies, service companies, financial institutions, large private equity, manufacturers, wholesalers and retailers.

Sherri regularly speaks at COST and TEI events. She also speaks at American Bar Association tax conferences and internal RSM events on a variety of state and local tax topics, including alternative apportionment, audit strategy, structural planning, negotiated incentives, statutory credits and other income tax topics.

She has published numerous tax articles and alerts, and serves as a reviewer for technical documents published by RSM. She is a key resource in developing and delivering internal training at the staff, manager and partner level.

During her more than 20 years of experience, Sherri has worked closely with her clients to identify state tax issues arising from mergers and acquisitions, provided structural planning and controversy services, negotiated state incentive packages and managed large complex compliance engagements for Fortune 100 companies. Prior to joining RSM US LLP, she was a credits and incentives market leader and state tax desk resource for a Big 4 firm.

Dr. Frank Levene, Independent Director, EMEA, Avitus Group



Frank Levene is a seasoned business executive who brings to the table decades of international business experience from living and working in over a dozen countries. As a US-UK dual national, Frank brings a unique perspective to advising international clients on understanding and succeeding in the American Market. Frank launched Avitus' international business efforts in 2013 and has since that time assisted countless UK firms with navigating US growth.



THANK YOU FOR JOINING US



SNABC
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