

## SPEAKER PROFILES



### **Daniel J. Kimbell, CTFA/CRSP/CCTS/CSOP**

Executive Vice President, Managing Director  
Passumpsic Financial Advisors

Daniel has over 40 years of experience in investment management, financial planning, estate planning fiduciary relationship management and retirement funding. Prior to joining Passumpsic Financial Advisors 22 years ago, he served as Financial Consultant/AVP at TD Banknorth Wealth Management where he was responsible for managing personal trust relationships and private endowment funds.

Daniel's professional associations include the Vermont and New Hampshire Banker's Association Trust Committees, Corporator for Northeastern Vermont Regional Hospital, President of St. Johnsbury Development Fund, Chair of the Finance Committee for the Fairbanks Museum & Planetarium, Member of the Vermont Supreme Court Advisory Committee on Probate Procedures, and Selectman for the Town of St Johnsbury, VT.

Daniel has his Wharton Business School Leadership Certificate, is a graduate of the ABA Stonier Graduate School of Banking NSB at the University of Pennsylvania and earned his AS from Champlain College. He also graduated from the Cannon Financial Institute Personal Trust and Trust Graduate programs and has completed the AIB Banking Diploma program. Daniel is registered through FINRA with a Series 7 - General Securities Representative and Series 66 - Registered Investment Advisor Representative for Infinex Investments, Inc.

Professional designations include Certified Trust & Financial Advisor (CTFA), Certified Retirement Service Professional (CRSP), Certified Corporate Trust Specialist (CCTS) and Certified Securities Operations Professional (CSOP) as awarded by the Institute for Certified Bankers.



### **Susan Martore-Baker**

President  
Cambridge Trust

Susan has overall responsibility for Cambridge Trust's New Hampshire relationships. She works with individuals, municipalities and non-profit organizations to bring solutions to a variety of financial issues. Susan also provides guidance on the benefits of New Hampshire's trust laws.

- B.A., Furman University, 1979
- M.B.A, Southern New Hampshire University, 1991
- Joined Cambridge Trust in 2011
- Prior work experience at CFX Bank, Shawmut Bank, U.S. Trust (formerly State Street Global Advisors) and Citizens Bank
- Former Chair, New Hampshire Women's Foundation Board of Directors
- Board of Directors, Treasurer, Canterbury Shaker Village
- Board of Directors, Secretary, Mayhew Program for At-Risk Boys

- Advisory Board, St. Anselm College Center for Ethics in Society
- Chair, New Hampshire Bankers Trust Committee
- Former Member, Manchester Region Advisory Board of the New Hampshire Charitable Foundation



**Ada H. Paddock**  
Manager  
Wolf & Company

Ada is a Manager in Wolf's Risk Management Group and serves on Wolf's Internal Audit Team. She is responsible for delivering internal audit services to financial institutions, including bank holding companies and credit unions, as well as cooperative, commercial, community savings banks, and trust companies. Ada has significant knowledge in financial audits and the operations of lending and servicing, branch and deposit, automated clearing house (ACH), wire transfers, human resources, Regulation W, and trust operations.

With over seven years of experience in the field, Ada has expertise in the optimization of the internal audit department, trust operations, SOC 1 control reviews, and serves as Wolf's trust expert. Throughout her career, Ada has overseen operational and financial audits for institutions ranging from \$100 million in assets to multi- billion dollar holding companies.

Ada lives in Massachusetts with her family, and when she's not at work, she enjoys traveling and spending time with her family.

#### Involvement

- Institute of Internal Auditors (I IA) – Greater Boston Chapter
- Massachusetts Society of Certified Public Accountants (MSCPA)

#### Education

- Bachelor of Science in Political Science from University of Oregon
- Juris Doctorate from Whittier Law School



**Mary Piotti**  
Principal  
Wolf & Company

Merry is a Principal in Wolf's Advisory Group and serves on the Firm's Internal Audit Team, where she provides internal audit, consulting, and risk management services to clients. She also oversees the Firm's data analytics team —combining operational and technological knowledge to perform model validation reviews, conversion testing, and incorporate analytics into audits. With over 13 years of experience in the field, Merry works with clients to provide full internal audit services, supplement internal audit capabilities, assist with specialized reviews, and develop risk - based audit plans with outsourced and co-sourced internal audit departments.

Merry lives in Bellingham, Massachusetts with her husband and three children. When she's not at work, she enjoys playing on the Wolf soccer team, spending time outdoors with her family, running, and solving puzzles.

## Involvement

- American Institute of Certified Public Accountants (AICPA)
- Institute of Internal Auditors (IIA)
- Massachusetts Bank Internal Auditors (MBIA), President
- Massachusetts Society of Certified Public Accountants (MSCPA)
- Nichols College Graduate School, Former Adjunct Professor



**Brian Gottlob**  
Principal  
PolEcon Research

PolEcon Research is an economic research firm based in New Hampshire.

PolEcon specializes in identifying, understanding and communicating emerging economic, demographic, energy, fiscal, labor market, real estate, and public policy trends at the intersection of private sector activity and government policy, where public sector action or inaction can significantly impact the growth, development, and profitability of individual businesses, industries, not-for-profit organizations, and geographic regions.

Brian currently serves as Economic and Labor Market Information Bureau Director at the NH Department of Employment Security.



**J. Phil Buchanan**  
Executive Chairman of the Board, CFP®, CWS®  
Cannon Financial Institute

Phil Buchanan serves as Executive Chairman of the Board for Cannon Financial Institute. As one of the most highly regarded wealth management experts in the country, he has worked with major financial services firms in North America and their subsidiaries abroad as a speaker, trainer, consultant, and coach.

Phil writes for industry publications, delivers keynote addresses, and frequently engages with media on wealth management issues. In addition, he serves as the host of three podcast series, where he focuses on leadership, entrepreneurship, and industry trends. Entrepreneurial by nature, Phil has served as President of Argent Financial Group, the non-executive Chairman of Laurus Holdings, a member of the board of LibertyFi, the Association of Trust Organizations, and Lambda Housing.

Phil strives to simplify the complex. Through his straightforward approach to all aspects of practice management, wealth management professionals advance their knowledge and skills necessary to communicate their expertise. Ultimately this creates a more sustainable, rich client and prospect experience within the advisory practice.

Phil personifies the unwritten oath which drives success for professionals within the financial services industry be prepared to always offer your client the best in counsel and advice, regardless of how it impacts you.

**Laura Gregg**

Director of Practice Management and Advisor Research  
FlexShares Exchange Traded Funds, managed by Northern Trust

Laura Gregg is Director of Practice Management and Advisor Research at FlexShares Exchange Traded Funds, managed by Northern Trust. She is focused on leading the firm's proprietary advisor and investor research and building programs to help advisors and asset managers strengthen their businesses.

Laura is a host of The Flexible Advisor podcast where she regularly speaks with industry experts, advisors of all types and experts on a wide range of advisory topics. She speaks regularly at industry events on a range of business building strategies. Her insights have been published in Forbes, Barron's, U.S. News & World Report, InvestmentNews, Financial Advisor Magazine, Wealth Management, CIO Magazine among other industry publications.

Laura has more than 20 years of asset management experience in a variety of roles including conducting industry research, as a relationship manager, marketing and communications director, leader of a sales enablement team and as an investment product specialist. She has expertise in a broad range of investment products and has worked closely with financial professionals and financial institutions throughout her career focusing on distribution and marketing strategies.

Laura joined Northern Trust in 2008, and has previously worked for Claymore Securities (now part of Invesco) and Deutsche Asset Management. She graduated from Saint Mary's College, Notre Dame, IN and holds FINRA 7 and 63 licenses. Laura assists in guiding strategy for the Chicago chapter of Women Investment Professionals, sits on a membership committee with the Money Management Institute and is a member of Women in ETFs.

**SUBJECT MATTER EXPERTISE**

- The New Rules in Growing Wallet Share
- The Business Imperative for Diversity, Equity and Inclusion in Advisory
- The Race to Scalability and Efficient Business Growth
- The Surprising Impact of Gender on Engaging Executive Investors

**E. Loyd Pohl**

Chief Executive Officer  
Pohl Consulting and Training, Inc. & *TRUSTCOMPARE*

A former bank manager with decades of financial industry experience, Mr. Pohl began his Financial Services career in 1980, his consulting career in 1992 and purchased the firm for which he was the Sr. Consultant in 2000. In late 2007 he purchased TrustCompare to add the benchmarking line of business to the firm. He then expanded the firm's compliance consulting capabilities with the development of the Wealth Management Compliance Alliance in 2014.

Mr. Pohl is a graduate of the Prochnow Institute Graduate School of Banking, and Southern Illinois University with both a Master's and a bachelor's degree in Agribusiness Economics.





**Linda Varrell, APR**  
President & Founder  
Broadreach Public Relations

Linda Varrell has close to 30 years of experience in communications, public relations, crisis handling, and project and sales management. As a former vice president and company spokesperson for a publicly traded financial institution, she created and executed external and internal communications campaigns supporting expansive growth, product introductions, mergers, acquisitions and divestitures, financial disclosures, high-visibility construction, and technology projects as well as numerous crises. She is nationally accredited in public relations (APR), holds a master's degree in organizational leadership and is regularly tapped to speak at C-level events and industry-specific conferences. Linda is a member of the Forbes Business Council, instructor for New England School of Banking and serves on numerous nonprofit boards, including Past President of the Maine Public Relations Council, Board Member for Maine Press Association, Institute for Family-Owned Business, USM Foundation and LifeFlight Foundation.



**Mike Macero**  
Director, Washington National Tax Estates, Gifts & Trust Group  
KPMG

Mike is a Director in the KPMG Washington National Tax Estates, Gifts & Trust Group. He has been with the firm for over 20 years; and has over 40 years of industry experience in fiduciary, charitable, estate, gift and individual taxation. He provides tax technical support to various KPMG client service groups including our Trust Tax Services engagement teams, as well as our Business Tax Services, M&A and Family Office teams on a broad range of compliance and regulatory issues.

In addition, Mike's specialties include generation skipping tax analysis and planning, postmortem estate and income tax planning, as well as Marital and Charitable Trust funding analysis. Mike is also a Generation Skipping Tax Specialist with the firm and has also served as a lead instructor for KPMG's trust tax client and staff training.

Mike is a frequent speaker at KPMG and industry trainings and seminars and provides training on trust, gift, estate and generation skipping tax related topics.

#### Education and licenses

- BSBA, Boston University
- MSA, Bentley University
- Licensed IRS Enrolled Agent since 1981



**John B. Bingham**

SVP, Business Development, Philanthropic and Family Office  
Solutions  
SS&C Innovest Systems

John has extensive experience in philanthropic and institutional trust operations, asset management, and planned giving. He began his career with a large Community Foundation in Texas, devoting his time to raising funds through planned giving, and managing the funds by converting a manual set of books to the computer. He developed functionality for Principal and Income Portfolio accounting systems to manage, document, and track the entire portfolio of charitable trusts and endowments, and manage unique assets for Family Offices. He has been successful with Community Bank Trust solutions, as well.

BancCorp Systems (TrustProcessor), NCS Series 7 & 11, SunGard Charlotte and Advantage, and currently Innovest Systems has provided a wide range of learning experience in all things trust. This includes Partnership, Corporate, General Ledger Reporting, Performance Measurement, Tax Processing, and Unitized Accounting solutions.

Certifications: FINRA, Series 7, 24, & 63 (Inactive)

Texas Real Estate Broker's License (Active)

Education: BBA from the University of Houston (1975)

MBA from West Texas A&M University (1986)