



NORTHWOOD  
UNIVERSITY

Stephens

*Presents*

# NORTHWOOD — STEPHENS AUTOMOTIVE FORUM

***Covering Pertinent Topics for  
Dealerships and Aftermarket Providers***

*Sponsored by:*

*Stephens Inc. and Northwood University*

***April 16 and 17, 2025***

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**HOST/SPEAKER BIOGRAPHIES**

## FIRESIDE CHAT SPEAKERS



### **Joe Leger**

*Vice President, TRP Capital Partners*

- Joined TRP in 2020
- Previously served as an Associate for Baird in their investment banking division
- BS in Finance from Michigan State University

### **Session 2**

*Aftermarket Investments*



### **Tim Batchelor**

*Co-Founder, Managing Director, Open Road Capital*

- Co-founded Open Road Capital in 2010
- Previously founded White Peak Capital; a Washington DC based merchant bank specializing in the national security industry
- MBA with concentration in Finance from Columbia Business School, BA in Accounting from James Madison University

### **Session 3**

*Looking Inward:  
Opportunities  
to Partner with  
a Financial  
Sponsor*



### **Peter Sheptak, JD**

*Vice President, General Counsel, Open Road Capital*

- Joined Open Road in August 2023 with 30+ years in M&A, finance, and private equity.
- Held key roles at JM Family Enterprises, Seven Isles Capital, and top law firms.
- Holds a Finance degree from Notre Dame and a J.D. from Duquesne University.

## FIRESIDE CHAT SPEAKERS



### **Tom Murphy, CFA**

*Director, Barings*

- Joined Barings in 2018
- Previously served as a Senior Associate at Medley Management Inc.
- BSBA in Finance and Economics from the University of North Carolina Wilmington

#### **Session 4**

*Financial Reporting and Accessing the Capital Markets*



### **Louie Galbraith, CPA**

*Partner, Forvis Mazars, LLP*

- Focused on the firm's dealership clients and helps dealers and investors acquire and sell stores through financial and operational due diligence and closing assistance
- 18+ years of public accounting experience performing assurance and advisory services
- BS in Accounting from The Ohio State University



### **Steve Greenfield**

*General Partner, Automotive Ventures*

- 25+ years of experience in the automotive technology space
- Previously served as TrueCar's SVP of Strategy and Business Development and AutoTrader.com's VP of Product Management and Business Development
- MBA from Emory University, BA in Health Sciences from York University

#### **Session 5**

*Looking Around the Corner: Key Industry Themes*



### **Mary Kissel**

*EVP, Senior Policy Advisor, Stephens Inc.*

- Joined Stephens in 2021
- Previously served as Senior Advisor to Secretary of State Michael R. Pompeo
- Graduate of Harvard University and the Johns Hopkins School of Advanced International Studies

#### **Session 6**

*The Global Reordering and Why It Matters*

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## NORTHWOOD UNIVERSITY



**Kent MacDonald**

*President, Northwood University*

- Joined Northwood University in 2019
- Previously served as president and vice-chancellor of St. Francis Xavier University (StFX), one of Canada's oldest and most respected universities
- Doctorate of Education from University of Pennsylvania, M.Ed, M.B.A., University of Ottawa, B.S.c from St. Francis Xavier University
- Dr. MacDonald's doctoral research focused on high-performing colleges and presidential leadership. In this regard, he has addressed audiences worldwide, including Europe, Southeast and Central Asia, Latin America, and the Middle East.



**Kristen Stehouwer**

*Provost and Academic Vice President, Northwood University*

- Joined Northwood University in 2009
- Previously served as the Executive Director of Research and Planning and Vice Provost for Arts and Sciences at Macomb Community College
- Ph.D., M.A., and B.A., Northwestern University



**Matt Bennett**

*Vice President, Enrollment & Strategic Alliances, Northwood University*

- Returned to Northwood University in 2022.
- Previously served as the Senior Vice President, Institutional Advancement at Cleary University.
- D.B.A., Lawrence Technological University, M.B.A. and B.B.A., Northwood University.



**Murray Kyte**

*Vice President Advancement, Northwood University*

- Joined Northwood University in 2022.
- Previously served as the Vice President, for Advancement, at St. Francis Xavier University, one of Canada's oldest and most respected universities.
- LL.B., University of Ottawa, M.Ed., Charles Sturt University, B.B.A., St. Francis Xavier University

## STEPHENS INC.



### **Matthew Marks**

*Executive Vice President,  
Head of Investment Banking*

- Joined Stephens in 2002
- Executed over 70 transactions across multiple industries, including 390+ dealerships
- BSBA in Accounting from Washington Lee University



### **Joe Mowery**

*Managing Director,  
Head of Dealerships*

- Joined Stephens in 2000
- Significant M&A and financing experience as a banker and lawyer
- JD from University of Arkansas Law School, BSBA in Finance from University of Arkansas



### **Davidson Hall**

*Managing Director,  
Co-Head of Debt Capital Markets*

- Joined Stephens in 2008
- Previously worked at Banc of America Securities in the Leveraged Finance Group completing \$20+ billion in financings
- MBA from Vanderbilt University, BA in Business Administration from Furman University



### **David Jett**

*Managing Director,  
Aftermarket*

- Joined Stephens in 2023
- Previously worked at JP Morgan as an Executive Director
- BBA in Finance and Economics from the University of Georgia



### **Stan Dimitrov, CPA**

*Senior Vice President,  
Dealerships*

- Joined Stephens in 2014
- Focuses on transaction advisory work across all dealership sectors
- BSBA in Finance and Accounting from the University of Arkansas Little Rock



### **Andrew Mayes**

*Associate,  
Dealerships*

- Joined Stephens in 2020
- Focuses on transaction advisory work across all dealership sectors
- BSBA in Finance and Accounting from the University of Arkansas

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