

**War Stories – Latest Developments on the M&A Front**  
**Professional Development Panel Discussion – September 20, 2012**  
*Presenter Biographies*

***Moderator***

**Josette Ferrer, Founder and Managing Director**  
**Clairant Advisors**

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Josette Ferrer is the founder and a Managing Director of Clairant Advisors. Since 1993, Josette has been assisting clients with the valuation of closely held businesses and business interests, intangible assets, intellectual property, stock options, debt instruments, capital equipment / fixed assets, and other assets.

Prior to founding Clairant Advisors in 2010, Josette was the U.S. Practice Leader of Marsh's Valuation Services Group (formerly Kroll's Valuation Services Practice). Her career includes serving as the Managing Director in charge of the San Francisco Valuation Services Group of WTAS, Inc. ("WTAS"), a former subsidiary of HSBC Group. At WTAS, Josette's responsibilities included developing and overseeing all technical, operational, marketing functions for the SF valuation team. Prior to WTAS, Josette was a director with Huron Consulting Group and a senior manager at Arthur Andersen LLP.

Josette has been responsible for over 500 significant valuation engagements to date, focusing on valuation analyses for financial reporting purposes (including allocations of purchase price related to business combinations, asset / goodwill impairment analyses, and stock option valuations) and tax planning and compliance (including appraisals performed for domestic / international tax planning and estate and gift tax reporting). While Josette has extensive experience serving clients in many industries, areas of specialty include high technology, early stage ventures, telecommunications, services companies, and consumer products. Her clients have ranged from small, emerging businesses to Fortune 500 companies. Josette holds a B.S. in Business Administration from the University of California at Berkeley.

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***Panelist***

**Jeanne Angelo-Pardo, Chief Financial Officer**  
**Flurry, Inc. and Ultriva Inc.**

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Jeanne has over 27 years of financial experience and serves as the Chief Financial Officer of two companies – Flurry, Inc., which offers mobile application analytics, acquisition, and monetization services; and Ultriva, Inc., a developer of manufacturing solutions for the industrial, healthcare, automotive, and electronics markets. Prior to Flurry and Ultriva, Jeanne was the CFO at deCarta, Inc., a location-based services company, where she helped secure several rounds of funding and assisted in the company's international expansion.

Jeanne began her career as a CPA at Coopers & Lybrand, before leaving to spend ten years in various financial management positions at Cadence Design Systems, joining the company in its start-up phase and helping it grow to a multi-million dollar public company. Jeanne graduated from the University of California, Santa Barbara, with a Bachelors degree in Business Economics, and became a Certified Public Accountant in 1983.

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***Panelist***

**Trevor Cox, Founder**  
**Trevor Cox Consulting**

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Trevor is the founder of Trevor Cox Consulting, which specializes in providing corporate development, strategy, and legal services. He is currently working on two buy-side M&A transactions, ran the sell-side M&A process for a recent acquisition, and is also consulting on an IP litigation case. Current clients include Drop In Media LLC, a mobile content delivery company; Crowdcast (recently acquired by spigit), a provider of social business intelligence solutions; and Guavus, Inc., a provider of solutions for timely, big data decision-making for Fortune 1000 and Global 2000 enterprises.

Prior to founding Trevor Cox Consulting, Trevor was the Director of Strategy and Corporate Development at Brocade Communications Systems, Inc. while the company grew from \$574 million to \$2.1 billion in market capitalization. At Brocade, Trevor was involved in all aspects of mergers and acquisitions, corporate strategy, corporate initiatives, the strategic planning process, integration, and business development. Trevor's experience also includes serving as Senior Counsel for Wyse Technology (acquired by Dell Inc.), Managing Director and EMEA Legal Counsel for Infor Global Solutions, and an Associate at both Gray Cary Ware & Freidenrich (now part of DLA Piper) and Enterprise Law Group.

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***Panelist***

**Daniel Shea, Managing Director**  
**BDO Capital Advisors, LLC**

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Dan serves as Managing Director of BDO Capital Advisors, LLC and also as the Director of Business Development of BDO Valuation Advisors, LLC. He has over twenty years of experience providing transaction leadership to public and private companies as well as private equity firms. He has a wide range of industry qualifications with a primary emphasis on manufacturing and distribution clientele. Past noteworthy clients include Textron, Frozen Food Express, GM, TRW Automotive, Dana Corporation, Delphi, ThyssenKrupp, and Yokohama Corporation NA.

Before joining BDO, Dan was a Managing Director with Hadley Partners. Prior to Hadley, he served as a Managing Director with industrial investment bank W. Y. Campbell & Company (a subsidiary of Comerica Inc. – NYSE: CMA), most recently establishing and heading up the firm's Los Angeles office. Prior to that, he held a senior position with Ernst & Young Corporate Finance LLC.

Dan received an MBA in Finance from the Weatherhead School at Case Western and a BA in Economics for the University of Michigan. He has both Series 7 and 63 certifications.

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