Mesirow Speakers Bureau

Reflecting the breadth and depth of our 85-year history as an independent, employee-owned financial services firm, Mesirow's subject matter experts span Global Investment Management, Capital Markets and Investment Banking and Wealth and Retirement Advisory Services, as well as corporate responsibility.

Sign up for Spark, our quarterly email featuring insights on markets, sectors and investing in what matters.

FOR MORE INFORMATION
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Wealth and Retirement Planning

Jennifer Gartenberg, CFP®
Managing Director, Wealth Advisor
Wealth Management

EXPERTISE | Focus on investment, retirement and financial planning for families, non-profits and businesses. Specialized expertise in tax-advantaged investment strategies and selecting the right retirement account. Charitable giving strategies and financial acumen for women.

Tiffany Irving, CFP®, CEPA®
Senior Vice President, Wealth Advisor
Wealth Management

EXPERTISE | Comprehensive wealth planning for high net worth families, business owners, and non-profits; wealth transfer strategies, retirement planning, planning for women and the LGBTQ+ community

Gregg Lunceford, Ph.D, CFP®
Managing Director, Wealth Advisor
Wealth Management

EXPERTISE | Retirement lifestyle planning, diversity, equity and inclusion in finance. Published author on retirement and financial planning.

Sumit L. Desai, CFA
Senior Vice President, Director of Research
Wealth Management

EXPERTISE | Due diligence of equity, fixed income and global tactical allocation investments, ETFs, market perspectives, portfolio strategy and implementation

Robert Martin, CFA
Senior Vice President, Senior Investment Analyst
Wealth Management

EXPERTISE | Due diligence of equity, fixed income and global tactical allocation investments, ETFs, market perspectives, portfolio strategy and implementation

Fiduciary Solutions

Keith Gustafson, CFA
Managing Director of Asset Allocation and Retirement Income
Fiduciary Solutions

EXPERTISE | Asset allocation

Chris O'Neill, PhD, CFA, CFP®, FRM®, ChFC®
Managing Director, Chief Investment Officer and Director of Quantitative Research
Fiduciary Solutions

EXPERTISE | Retirement income

Wenli Tan, CFA
Managing Director
Fiduciary Solutions

Lavanya Batchu
Managing Director
Fiduciary Solutions

EXPERTISE | Manager due diligence

Diversity, Equity, and Inclusion

Carl H. Davis II
Senior Vice President, Head of Diversity, Equity and Inclusion and Corporate Recruitment
Human Resources

EXPERTISE | Diversity, equity and inclusion, corporate recruitment and retention

Macroeconomic

Leo Harmon, CFA, CAIA
Senior Managing Director, Chief Investment Officer, Portfolio Manager
Equity Management

EXPERTISE | Macroeconomic and equity market perspectives, financial services sector expertise, youth financial literacy education

Currency

Joseph P. Hoffman, CFA
Chief Executive Officer
Currency Management

EXPERTISE | Currency management strategies, FX trading, overlay strategies, derivatives, investment trends and customized solutions

Richard Turner
Managing Director, Head of Research
Currency Management

EXPERTISE | Machine learning, quantitative modeling, systematic FX trading, Artificial Intelligence applications to financial markets

Investment Management

Steve Swierczewski, CFA
Senior Managing Director
Global Investment Management Distribution

EXPERTISE | Investment management trends, traditional investments, alternative investments, capabilities for institutional investors

Equity Management

Leo Harmon, CFA, CAIA
Senior Managing Director, Chief Investment Officer, Portfolio Manager
Equity Management

EXPERTISE | Equity market insights, small and small-mid cap investing, banks and financial sector, research, macroeconomic views, sustainable/ESG investing, youth financial literacy education

Capital Markets | Institutional Sales and Trading

George E. A. Barbar
Senior Managing Director
Institutional Sales and Trading

EXPERTISE | Rates, government agency, supranationals and structured products, civic and community engagement

Ali Haghighat
President and Head of Taxable Sales and Trading
Institutional Sales and Trading

EXPERTISE | Credit-related products, mortgages, asset-backeds, other derivatives

Mark Whitaker
Managing Director, Head of Municipal Research
Institutional Sales and Trading

EXPERTISE | Municipal research, funding, and trading

Investment Banking

Brian Price
President and Chief Operating Officer,
Investment Banking | Head of Advisory Services

Adam Oakley
Managing Director
Investment Banking

EXPERTISE | General mergers and acquisitions

Paul Mariani
Managing Director
Investment Banking

EXPERTISE | Food mergers and acquisitions

Adam Oakley
Managing Director
Investment Banking

EXPERTISE | Aerospace and Defense mergers and acquisitions

John Chrysikopoulos
Managing Director
Investment Banking

Melanie Yermack
Managing Director
Investment Banking

EXPERTISE | Packaging mergers and acquisitions

Lance Bell
Managing Director
Investment Banking

EXPERTISE | Healthcare Services mergers and acquisitions

Daniel Miin
Managing Director
Investment Banking

EXPERTISE | Digital Health mergers and acquisitions