



INVESTMENT MANAGEMENT REGULATORY UNIVERSITY

2025

SPEAKER BIOGRAPHIES



JEFF BRUNS

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Jeff Bruns's practice focuses on creating tax-efficient structures for institutional investors in US real estate, including tax-exempt organizations, sovereign wealth funds and other non-US investors. He concentrates in the areas of partnership taxation, REITs, UBTI, FIRPTA, ECI and related aspects of federal income tax law. Jeff regularly represents fund sponsors and investment advisors in connection with all aspects of forming and operating private equity real estate funds, club deals, joint ventures and separate account investments. He also represents governmental pension funds, universities and non-US institutional investors in structuring and negotiating investments in all types of private investment funds, including buy-out funds, debt funds, hedge funds, infrastructure funds and funds of funds. Jeff has significant experience in capital markets transactions involving public REITs, including securities offerings, UPREIT transactions, mergers and acquisitions. He also advises clients on a broad variety of transactions involving partnerships, LLCs and joint ventures, such as asset contributions, roll-ups, compensatory interests, mergers and liquidations.



TODD BUNDRANT

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Todd Bundrant represents financial institutions, investment funds, and corporate borrowers in a variety of secured and unsecured finance transactions. Lenders and borrowers turn to Todd to help them with their transactions involving private equity funds, credit funds, and other alternative lenders seeking to expand and/or leverage their portfolios. These transactions include subscription-backed credit facilities, NAV facilities, hybrid credit facilities, repurchase facilities, bi-lateral loans, and other acquisition financing arrangements. Major US and foreign banks also seek counsel from Todd when they act as lead agent and arranger in syndicated credit facilities, as well as when restructuring various types of lending arrangements.

Todd works on structures involving a variety of non-standard collateral, including private equity fund interests, hedge fund interests, capital contribution obligations, management and incentive fee streams, and asset-backed securities. Private equity sponsors, real estate investors, and developers also seek counsel from Todd in a variety of commercial real estate transactions, including joint ventures, acquisitions, and dispositions involving a broad range of assets such as retail centers, industrial parks, apartment complexes, condominiums, assisted living facilities, and single-family residential developments, as well as restructuring financing arrangements related to all of the above.



ERIN CHO

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Erin has extensive experience advising financial institutions, asset managers, insurance companies, and other retirement plan service providers with respect to the many and varied services and financial products they offer to US pension plans. She counsels hedge funds, private equity and real estate fund clients on the consequences of accepting investments by benefit plan investors. Erin also represents clients in front of the Department of Labor on advisory opinion and exemption requests as well as in audits and investigations. Erin regularly writes on pension investment matters for a variety of publications and has been recognized by *Chambers USA*, *The Legal 500* and *The Best Lawyers in America*.



JODI ERLANDSEN

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Jodi Erlandsen leverages nearly thirty years of experience, including as general counsel and head of compliance for several SEC-registered investment advisers, to assist traditional, alternative, and international investment managers with ongoing legal and compliance matters.

Jodi focuses on investment adviser registration and exemption requirements, regulatory compliance, international regulatory matters and non-US investment advisers, designing and administering all facets of client compliance programs, broad and extensive contract review, asset management mergers and acquisitions and integrations, ongoing legal and compliance matters affecting separately managed accounts, wrap accounts and private funds, as well as technical securities law guidance impacting retail and institutional managers of all sizes.



KIM HAMM

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Kim Hamm provides strategic guidance to financial institutions on key regulatory and legislative matters. She formerly held high-level government positions, including Chief Counsel to the Chairman of the Securities and Exchange Commission and General Counsel to the Speaker of the US House of Representatives. She draws upon this experience to provide corporate clients with the political acumen and legal expertise required to successfully navigate the emerging challenges of today's increasingly polarized political environment. Kim also leads Mayer Brown's Congressional Investigations practice.



JENNA HARTNETT

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Jenna Hartnett represents issuers, underwriters, managers, investment banks, insurance companies, REITs, investors and hedge funds on a variety of corporate, structured and asset-backed financing transactions including collateralized loan obligations, collateralized fund obligations, warehousing facilities, repackaging, refinancing and repurchase agreement transactions.

Jenna's securitization experience includes transactions involving various asset classes, including residential mortgage loans, marketplace consumer loans, fund interests, commercial mortgage loans and commercial loans.



ANDY HOGAN

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Andy Hogan helps financial institutions, investment funds and fund borrowers in a variety of financing transactions, including subscription-backed credit facilities, hybrid (NAV) facilities, bilateral loans, and structured fund financings. Clients turn to Andy for his extensive experience in fund finance structuring and versatility in finding solutions to complex issues.



MICHELLE JEWETT

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Clients turn to Michelle Jewett in matters related to all areas of federal income taxation, including with regard to private investment funds, real estate, real estate investment trusts, mergers and acquisitions, partnerships, energy and infrastructure, financial restructuring, and financial instruments both domestically and internationally. Clients value Michelle's ability to provide practical guidance with respect to complex tax concepts in a manner that is understandable and approachable.

Clients seek Michelle's advice on structuring private investment funds, real estate investments by taxable and tax-exempt entities, cross-border taxable and tax-free mergers, acquisitions and dispositions, domestic and foreign private equity investments, various international investments and transactions, and bankruptcy and debt workouts. She has structured numerous cross-border arrangements, including US and foreign private equity funds, real estate funds, timber funds, energy and infrastructure funds, credit funds, and hedge funds. In addition, Michelle regularly advises clients regarding the tax issues associated with real estate, infrastructure, and energy investments.



ADAM KANTER

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Adam Kanter counsels US and non-US investment advisers, investment companies, and other financial services firms on a variety of regulatory, compliance, examination, enforcement, and transactional matters.

Adam has advised clients on a wide range of investment management matters, including formation, registration, and ongoing compliance issues of investment advisers and investment companies. Clients turn to him when adapting to new regulations, such as the amended marketing rule under the Investment Advisers Act of 1940, and the amended fair value rule under the Investment Company Act of 1940. Additionally, he helps with the preparation of compliance policies and procedures, registration statements, proxy statements, "no-action" letter requests, exemptive applications, comment letters, and corporate documents.



TIM KEELER

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Tim is a Partner and Co-Head of Mayer Brown's International Trade Practice. Tim also leads the Firm's Committee on Foreign Investment in the US (CFIUS) and Outbound Investment Regulation practices, providing legal and strategic advice to clients on proposed investments, transaction negotiations, navigating the CFIUS review process, and negotiating mitigation agreements with the government. Tim has worked on CFIUS issues in and out of government for more than two decades, including two major rewrites of the CFIUS statute by Congress, and has advised clients on the CFIUS implications for hundreds of successful transactions. Tim joined Mayer Brown in 2009 after a varied career in the US Government, serving at the Office of the US Trade Representative (USTR), the US Treasury Department (which chairs CFIUS), and the US Senate Finance Committee. Tim obtained his JD from the George Mason University School of Law (now Antonin Scalia Law School), and a BSE in Engineering Science from Tulane University; served as an Adjunct Professor at Georgetown University Law Center from 2010 – 2018; and is on the Board of the Washington International Trade Association.



JIM KELLY

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Jim Kelly advises a wide range of investment management firms, providing alternative investment managers and investors experienced counsel regarding innovative investment products.

Jim has broad industry experience, including advising clients with respect to hedge funds, private equity funds, real estate funds, search funds, venture capital funds, and other private investment funds. He also advises clients with respect to separate accounts, joint venture arrangements and co-investment, secondary and continuation fund structures and transactions.

Jim assists clients with the structure and organization of investment funds and accounts and with regulatory compliance, operational, and investment matters. He also provides counsel on the formation and operation of sponsor and management entities and arrangements among firm principals.

Jim helps investment managers and investors with complex business arrangements, including launching and seeding new investment programs and businesses, fund restructurings, management reorganizations, and spin-outs.



MICKEY LEIBNER

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Mickey Leibner helps clients navigate the intersection of regulatory and political matters. He advises clients on the Outbound Investment Security Program administered by the Department of the Treasury, providing insight into the bevy of new regulations in this area. Mickey also has significant experience before the Committee on Foreign Investment in the United States (CFIUS) and has advised on hundreds of transactions involving companies ranging from multinational Fortune 500 corporations to small startups. He counsels clients on all aspects of the CFIUS process—from analyzing transactions to determine if a CFIUS filing is required or recommended, to drafting CFIUS filings, responding to questions from CFIUS, and negotiating and implementing mitigation agreements.

Mickey also advises a variety of clients in the private, nonprofit, and government sectors on a number of political law, campaign finance, and lobbying compliance issues, especially with respect to the Lobbying Disclosure Act, the Foreign Agents Registration Act, and political action committees. He helps clients implement internal political law compliance processes, as well as create a range of nonprofit and political organizations. Mickey also lobbies and advocates regularly to US congressional staff and elected officials and is particularly adept at helping clients navigate interactions with local, state, and federal governments.



BRIAN MAY

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Brian May represents fund sponsors in structuring, offering, negotiating and closing real estate private equity funds. His experience includes funds that are offered principally to institutional investors in the US, Asia and Europe. Brian also structures and negotiates co-investments, joint ventures and other investment opportunities in a wide range of real estate investment strategies. In addition, he represents buyers and sellers in connection with stock and asset acquisitions and divestitures, mergers, joint ventures, financings, reorganizations, stockholder arrangements and similar transactions.



PETER MCCAMMAN

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Peter McCamman represents investment advisers and investment companies (including mutual funds, closed-end funds, and funds of funds) as well as private funds and their sponsors.

Peter advises clients on a range of investment management and related regulatory matters, including formation, registration, ongoing operation, compliance, and reorganization of investment advisers and investment companies. He advises clients on investment management regulatory and business matters; preparation and review of compliance policies and procedures; SEC examinations and inquiries, comments letters and correspondence; “mock” examinations, targeted compliance and business practice reviews; internal investigations; registration statements and forms; corporate documents; and other regulatory and business filings.



ANDREW OLMEM

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Clients rely on Andrew Olmem for advice and counsel on complex financial services regulatory and legislative matters. He has extensive experience navigating federal financial regulatory agencies (including the Federal Reserve, SEC, CFTC, OCC, FDIC, and FHFA), evaluating prospective legislation and regulations, and representing clients in congressional and regulatory investigations and other high-risk matters.

Andrew previously served in the White House as the Deputy Assistant to the President for Economic Policy and Deputy Director of the National Economic Council (NEC), where he oversaw the development and coordination of the administration's domestic economic policies, including for financial services, technology, telecom, energy, and infrastructure. At the White House, he played a key role in the passage of the Coronavirus Aid, Relief, and Economic Security (CARES) Act, landmark legislation to address the economic downturn due to the coronavirus, and oversaw the administration's financial regulatory reform initiatives. He previously was the Republican Chief Counsel at the US Senate Banking Committee and was a lead staff negotiator of the Dodd-Frank Act.

Washingtonian Magazine listed Andrew as one of the 500 Most Influential People in Washington, while *The American Lawyer* named him one of their "Trailblazers," recognizing individuals who are agents of change in the legal industry.



JOONBEOM PAE

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Clients value JoonBeom Pae's creative, solution driven approach and deep experience in advising private fund sponsors on structuring and operating a wide range of funds, including credit, direct lending, buy-out and infrastructure funds. He focuses primarily on advising private funds sponsors and investors on fund formation and investments. JoonBeom works closely with his clients to achieve their commercial goals while navigating complex legal and business challenges.

JoonBeom also advises sovereign wealth funds, large insurance companies, and other financial institutions on tax matters unique to these investors, drawing on his extensive experience with US trade and business issues, commercial activities, unrelated business taxable income, and withholding concerns. He regularly advises on implementing treaty-based, levered blocker, or guideline-based structures, as well as rated feeders.

As a seasoned partnership tax lawyer, JoonBeom frequently advises on M&A transactions involving pass-through entities. He also has significant experience in tax credit transfers, having led several groundbreaking transactions for a leading private equity sponsor and one of the largest utility companies in the United States, as well as advising on tax and other corporate matters for a renewable energy company.



CLAIRE RAGEN

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Claire represents both sponsors and investors on a wide variety of investment matters. She has broad experience in the formation and structuring of open-end and closed-end private equity funds utilizing a variety of investment structures and investment strategies, with a particular focus on real estate, real estate-related and structured finance investments. Claire also has extensive experience representing asset managers creating investment products to facilitate investment by defined contribution plans into private equity and private debt investments. Claire regularly counsels institutional investors in investments in private equity funds, hedge funds, managed accounts, and other alternative investments. Her comprehensive knowledge and experience make her a valuable asset in navigating the complexities of investment management for sponsors and investors.



BRAD RESNIKOFF

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Brad Resnikoff represents non-US and domestic financial institutions on regulatory, enforcement, and strategic issues. Global financial institutions seek out Brad for representation in significant multijurisdictional civil, criminal, and regulatory enforcement proceedings relating to money laundering issues, tax crimes, US economic sanctions, and corrupt practices. He assists clients with developing investigation strategy and manages internal investigations to assess allegations of misconduct, manage risk, and advise on legal strategies with regulators, law enforcement, Congressional investigators, and partner institutions. Clients praise his deep understanding of financial crimes laws and regulations and the complexities arising in cross-border contexts, including issues related to data privacy and legal privilege. Brad has in particular developed an in-depth knowledge of private banking business practices and related financial crimes risks, through representations of the world's foremost private banks on a variety of sensitive and strategic matters over the last nearly 15 years.

Clients also turn to Brad for guidance on legal and regulatory issues related to cross-border lending and securities activities, enhancing policies and procedures and compliance monitoring, performing risk assessments, employee training, and, where necessary, adopting appropriate remedial measures.



RICHARD ROSENFELD

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Richard M. Rosenfeld is the co-lead of Mayer Brown's Securities Litigation and Enforcement Practice and regularly counsels and represents financial services firms, corporations, funds, directors and their committees, officers, and employees in securities related business, regulatory, and compliance issues.

Securities Investigations: Richard uses his more than two decades of experience in the securities field, including more than a decade in increasingly senior government regulatory and enforcement positions, to defend SEC, CFTC, FINRA, DOJ, CME and other securities-related investigations. He leads internal investigations, often advising clients on preventive compliance and remedial measures before and after securities-related issues arise.

SEC Investigations: Richard acts as lead attorney in high-profile SEC investigations primarily representing well-known US and internationally based financial services firms. Typically, Richard's greatest successes for his clients never become public, as he has succeeded on many occasions in resolving matters before charges are filed or there is any public disclosure of the government's interest. Earlier in his career, Richard served in the Division of Enforcement at the SEC where he handled complex securities frauds and was detailed as a special prosecutor to US Attorney's offices across the country to assist in matters involving cross border financial fraud and disclosure, asset management issues, derivatives and insider trading, money laundering, and bank, mail, and wire fraud.

Securities Litigation: Richard calls upon his securities litigation experience in the federal courts in matters involving allegations of fraud, whether it be financial reporting violations, insider trading, market manipulation, or other regulatory or compliance issues, to advise on transactions, regulatory compliance, corporate governance, policies and procedures, and other SEC-related concerns.



LEE RUBIN

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Lee Rubin is a civil and criminal litigator with extensive experience in private practice and in the government, where for eight years he served as a prosecutor in the Department of Justice and as an Assistant United States Attorney for the District of Columbia. Lee, who has tried approximately 25 jury trials and has argued matters in the federal courts of appeals and the highest courts of the States, has a wide-ranging practice, with a concentration in the defense of corporations and individuals in criminal investigations and prosecutions and civil enforcement actions by government agencies, often involving alleged violations of the securities laws. He has also served as lead counsel in a number of internal corporate investigations, and has been involved in numerous securities fraud, antitrust and False Claims Act matters, as well as trade secrets and other commercial litigation involving technology companies. Following law school, Lee served as a law clerk to the Honorable Warren J. Ferguson, United States Court of Appeals for the Ninth Circuit.



JAN STEWART

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Jan Stewart is a finance and securities partner whose practice is focused on structured finance representing originators, investment banks, commercial banks, funds, asset-backed commercial paper conduits and investors in the public and private markets. Jan has experience structuring complex financing transactions, including the securitization of various types of assets such as solar loans and leases, credit card receivables, commercial loans (CLOs) and equipment receivables. Jan regularly advises both fund sponsors and insurance company investors on rated feeder fund transactions.



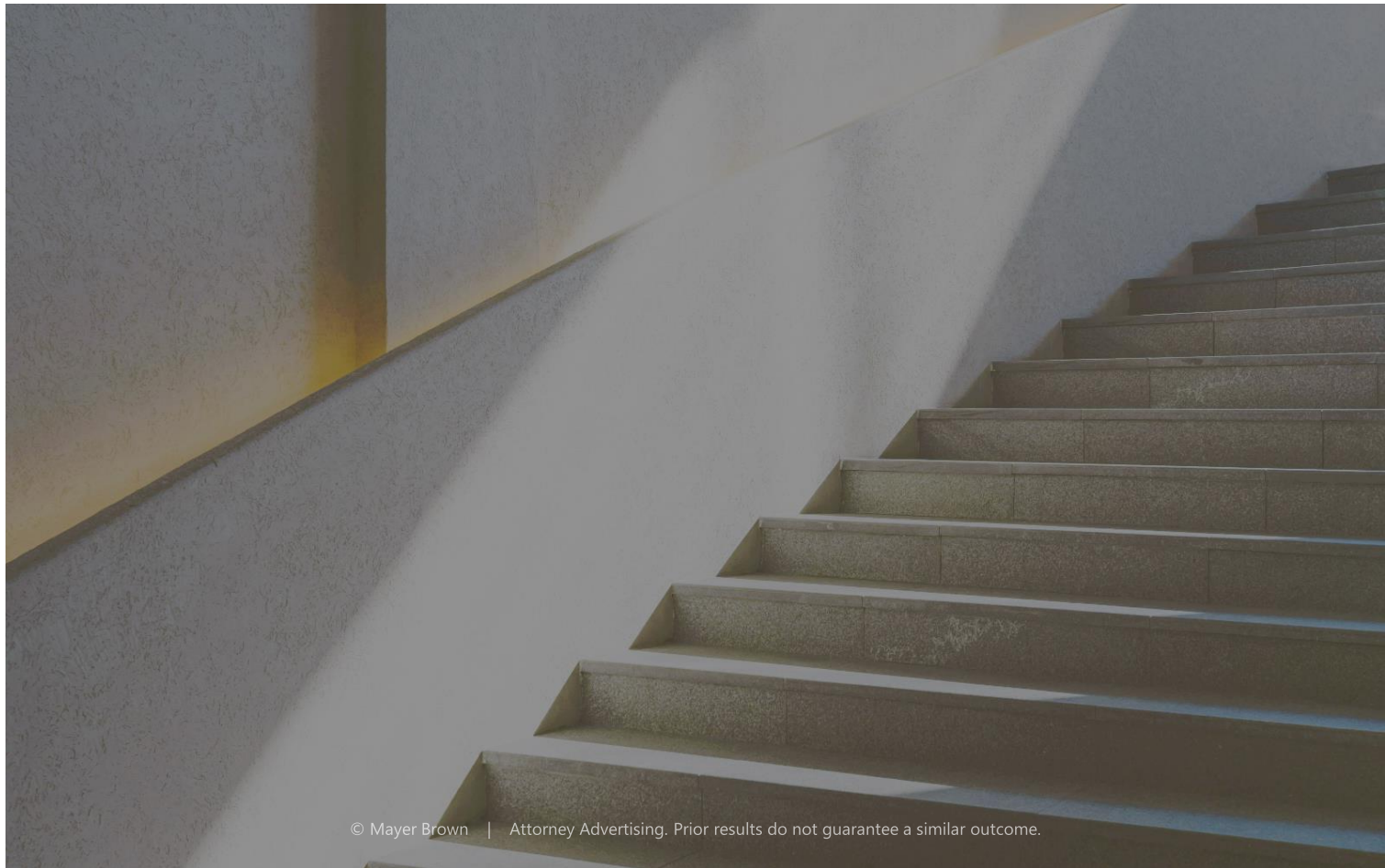
JARED WILNER

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Jared Wilner focuses his practice on advising domestic, foreign and alien insurers, reinsurers, insurance intermediaries and other insurance industry participants on a spectrum of insurance regulatory and transactional matters. These matters include mergers and acquisitions, joint ventures, investments, various distribution, services and other commercial contracts, reinsurance, insurtech, insurance product development, corporate governance, regulatory compliance and regulatory enforcement actions.

Jared began his career at the New York State Department of Financial Services (NYDFS), where he helped shape the policy response to various issues resulting from the 2008 financial crisis. Following his work at the NYDFS, Jared served as director and corporate counsel to Prudential Insurance's life and annuities business units, advising on the distribution and administration of insurance products, reinsurance, company licensing and domestication and regulatory advocacy relating to market conduct exams and new regulation.



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