COCKTAILS & CONVERSATIONS

YLS Young Leaders Society
UNITED WAY OF THE MIDLANDS

TOCQUEVILLE DONOR BIOS

KATY BAIR, CREDIT OPERATIONS MANAGER, TRUIST FINANCIAL CORPORATION

Katy Bair is Credit Operations Manager for Truist Financial Corporation. She oversees processes since being named Credit Operations Manager in October 2023, Katy's main focus was creating the Distributed Lending Playbook. Previously, she oversaw LIBOR Remediation for the Commercial Bank in her role as a Credit Team Leader. She also managed the South Carolina Commercial underwriting team and led teams through PPP 1.0 and 2.0. With 15 years of banking experience, she served as a Portfolio Manager for the Commercial and Middle Market teams after graduating from the Leadership Development Program in July 2009.

Passionate about serving her community, Bair serves on the board of the United Way of the Midlands, is the current Campaign Co-Chair and is on the Partnership Committee. She also serves on the board of the Trustus Theater and co-chairs the Events Committee. Previously she served as the President for the Contemporaries of the Columbia Museum of Art, Treasurer for Vital Connections of the Midlands and on the Steering Committee for Young Leaders Society of the United Way of the Midlands. She also serves in a volunteer capacity with Junior Achievement of South Carolina.

Bair earned a Bachelor of Arts in Finance from Wofford College. When she isn't working, Katy enjoys spending time with her husband, Charles, and their pets, cooking, traveling, playing tennis and volunteering.

Truist Financial Corporation is a purpose-driven financial services company committed to inspire and build better lives and communities. With 275 years of combined BB&T and SunTrust history, Truist serves approximately 12 million households with leading market share in many high-growth markets in the country. The company offers a wide range of services including retail, small business and commercial banking; asset management; capital markets; commercial real estate; corporate and institutional banking; insurance; mortgage; payments; specialized lending and wealth management.

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MIKE R. BRENAN, RETIRED TRUIST PRESIDENT

Mr. Brenan began his career in banking in 1975 as a management trainee. In 1988, he became the President and Chief Executive Officer of Bank One, Portsmouth, N.A. In 1994, he became Chairman, President and Chief Executive Officer of MainStreet Financial Corporation, a multi-bank holding company, headquartered in Virginia. In 1998 MainStreet was acquired by BB&T Corporation and Mr. Brenan subsequently moved to Columbia to assume his responsibilities with BB&T. Mr. Brenan holds a Bachelor of Arts in Economics from Bowling Green State University.

From the moment he arrived in Columbia, he has dedicated himself to public service, leading many of the most significant organizations in the community. Some of these include University of South Carolina's Moore School Business Partnership Foundation (Past Chairman), Claflin University, Midlands Business Leadership Group, TransformSC, (Co-Chair), Palmetto Business Forum, South Carolina Bankers Association (Past Chairman), United Way of the Midlands (Past Chairman), United Way Association of South Carolina (Past Chairman), South Carolina Independent Colleges and Universities (Past Chairman), South Carolina Chamber of Commerce (Past Chairman), Greater Columbia Chamber of Commerce (Past Chairman), Central SC Alliance (Chairman), SC Business and Industry Political Education Council (Treasurer), Governor's School for Science and Mathematics Foundation (Past Chairman), Palmetto Promise Institute, Trinity Forum, Washington D.C., South Carolina Philharmonic, Governor's Appointee to the South Carolina Board of Education.

He has been a stalwart supporter of United Way of the Midlands and its mission to unite people and resources to improve the quality of life in the Midlands. He has served as Chairman of the Board of Directors as well as Campaign Co-Chair from 2015-2017. He has championed the importance of improving education for the children of South Carolina, the need to improve our public transportation system in Columbia and many other causes that enable our community to achieve its full potential. Among his many service and professional accolades, Mike also received the Alyce Kemp Dewitt Volunteer Award in 2003 and Humanitarian of the Year in 2012 with United Way.

TOCQUEVILLE DONOR BIOS

Mr. Brenan is married to Julie Wyatt of Mansfield, Ohio. They have four grown children and four grandchildren: Erin is a graduate of the University of Virginia and received her MBA from the University of South Carolina; Andrew received his Economics degree from the University of South Carolina; Rob received his Engineering degree from Clemson University and MBA from NYU; and Molly graduated with a degree in Art History from the University of South Carolina and an MFA from Bennington College.

SHARON W. BRYANT, SOUTH CAROLINA REGIONAL EXECUTIVE VICE PRESIDENT OF FIRST CITIZENS BANK

Sharon W. Bryant is the South Carolina Regional Executive Vice President of First Citizens Bank. Previously, Bryant served as Executive Vice President and Division Executive, Regional Executive Vice President for Central South Carolina and Director of the Bank's Wealth Advisory Group, as well as President of First Citizens Securities. As South Carolina Regional Executive Vice President, Bryant is responsible for retail, business and commercial banking in South Carolina, Northeast Georgia, Augusta and Savannah. She was born in Columbia and graduated from the University of the South at Sewanee. She is currently a board member of the Palmetto Business Forum, the Business Development Corporation, the South Carolina State Museum Commission, and the Main Street District, as well as having an extensive history of past board experience. Bryant has more than 35 years of banking, fiduciary and investment services experience and is a licensed securities representative and principal. She has been recognized by the Girl Scouts of America, the YWCA, the Chamber of Commerce, First Citizens Bank, Junior League of the Midlands, and others. She is a graduate of Leadership Columbia, a founding member of Women in Philanthropy, and a Junior League Sustainer.

STEVE BRYANT, CEO AND CO-FOUNDER OF SYSTEMIC, INC.

Steve earned degrees in Business and Management from Clemson University and Limestone University.

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LYNDEY R. Z. BRYANT, PARTNER AND COMMERCIAL LITIGATION ATTORNEY AT ADAMS AND REESE, LLP

Lyndey advises business owners and their management teams in complex commercial litigation, including trial and appellate representation as well as arbitration and administrative proceedings. Her primary practice is litigation.

Lyndey Bryant has represented large and small businesses, officers, and directors in complex civil litigation, arbitration, and administrative proceedings. Through her work, she frequently counsels businesses and individuals regarding enforcement and negotiation of complex employment, non-compete, confidentiality, and trade secret agreements.

In addition, she has represented both fiduciaries and beneficiaries in disputes related to wealth transfer, including estate, trust, real estate, and closely-held business disputes, the exercise of fiduciary duties by trustees, executors, administrators, guardians, and powers of attorney. In these matters, Lyndey has counseled clients regarding issues of enforcement and modification of estate and trust provisions.

PEYTON BRYANT, MANAGING PARTNER AT TRINITY PARTNERS

Peyton Bryant serves as Managing Partner and Broker-in-Charge for Trinity Partners' Columbia, SC office. Peyton is responsible for the firm's day to day operations, recruiting, and attracting new business to the firm's brokerage and property management divisions.

Prior to joining Trinity Partners, Peyton served as an Executive Committee member and top producer at a regional commercial real estate brokerage firm, specializing in the sale and leasing of office/medical office and investment property sales of all types.

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Peyton has been consistently recognized for his professional accomplishments and contributions to the community, including Columbia Metropolitan Magazine's Capital Young Professional Awards (2017), Heathwood Hall Episcopal School's Anne T. Weston Distinguished Alumni Award (2018), The State Newspaper's "20 under 40" (2019), and Columbia Business Monthly's "Best and Brightest 35 and Under" (2020). He graduated from the Columbia Chamber's "Leadership Columbia" program in 2014.

Peyton is actively involved in the Midlands, SC community, currently serving on the boards of the Columbia Chamber of Commerce, South Carolina Chapter of CCIM (Certified Commercial Investment Member), United Way of the Midlands, Heathwood Hall Episcopal School, Midlands Housing Trust Fund, and the Diaconate of Eastminster Presbyterian Church.

A proud Demon Deacon, Peyton graduated from Wake Forest University with a degree in economics. Peyton is married to his better half, Lyndey and when he is not chasing his two young daughters, he can be found playing golf or mowing the lawn.

GLEN CAULK, PARTNER, NELSON MULLINS

Glen uses his background in lending, commercial real estate, development, land use, and leasing to help clients navigate challenges in the areas of buying, selling, leasing, and financing commercial transactions and real property. He represents lenders and borrowers in real estate finance, asset-based loans, and other credit facilities both unsecured and secured with non-real property collateral. He has assisted clients with acquisition, development, marketing, sales, and leasing of numerous classifications of properties including industrial sites, medical facilities, power generation facilities, hotels, retail properties (big box and mall), office buildings, timber, renewable energy facilities, student housing projects, multi-family apartment communities, and residential condominium complexes. Glen regularly coordinates with environmental, bankruptcy, economic development, and tax incentive (including tax credit) professionals both inside and outside the firm to structure transactions to the client's advantage.

TOCQUEVILLE DONOR BIOS

Glen focuses on negotiating and documenting real estate and loan transactions. He has experience in financing real estate through mortgage financing with banks, life companies, and equity partners throughout the United States. He has worked to create and enforce declarations of covenants, conditions, and restrictions, perform road closing and title defense actions, and has extensive experience negotiating financing arrangements, purchase and sale agreements, lease agreements, cost-sharing agreements, development agreements, and reciprocal easement agreements.

Glen issues legal opinions regularly for the firm and title insurance policies as an agent of multiple national title insurance companies in connection with these transactions. He is a former co-chair of the national commercial real estate practice group. He currently serves on the firm's Pro Bono Committee and Diversity, Equity, and Inclusion Committee.

LAUREN ELLIOTT, SVP, DIRECTOR OF CLIENT SERVICES, ENTRÉE HEALTH

Lauren serves as a client lead in delivering the highest quality of strategic excellence in support of various therapeutic areas, payer channels, brand market access strategies, product launches, and patient support programs. Lauren's passion is creating relationships with her clients. Through strong marketing partnerships, Lauren focuses on driving overall success for her clients' brands, with the goal of positively impacting patients' lives. Lauren is a native New Yorker, but has been enjoying every bit of Columbia, SC since 2014 when she moved here with her husband and 3 wonderful stepchildren.

JAMES A. D'ALESSIO, ESQ., VICE PRESIDENT OF GOVERNMENT AFFAIRS FOR BLUECROSS BLUESHIELD OF SOUTH CAROLINA

James currently serves as Vice President of Government Affairs for BlueCross BlueShield of South Carolina and the Companion group of companies.

TOCQUEVILLE DONOR BIOS

This family consists of more than 40 companies providing health insurance, administrative services, and technology solutions to state governments, the U.S. Department of Defense, Medicare, and commercial entities across the country. He is primarily responsible for developing corporate relationships and influencing public policy at all levels of government.

James has served as the President of the South Carolina Alliance of Health Plans, on the executive committee of the board of the South Carolina Chamber of Commerce, and on both the Health Insurer Council and Employee Benefits Committee of the United States Chamber of Commerce. In addition, he has served as chairman of the board of Youth Corps and as a member of the Cardinal Newman High School Advisory Board and the board of Columbia Children's Theater. James has focused his career on advocating for innovations designed to enhance healthcare quality and access and is often called upon for advice by candidates at every level from the State House to the White House.

James received his Bachelor of Arts in Political Science with Honors from the University of South Carolina Honors College and his Juris Doctor, Cum Laude, from Georgetown University Law Center in Washington, DC. He was one of two students selected by the Dean of the Law Center to serve on the National Law Alumni Board and was one of a handful of students selected to participate in Georgetown's Federal Legislation Clinic -- the only legal education clinic in the nation devoted to the study of the federal legislative and regulatory process.

Prior to assuming his current position, James served as Associate General Counsel, and was primarily responsible for interaction with state and local government. Prior to coming to Blue Cross, James served as a Judicial Law Clerk for Judge Carol Connor of the South Carolina Court of Appeals and spent several years in private practice.

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SARA SEITZ FAWCETT, PRESIDENT AND CEO, UNITED WAY OF THE MIDLANDS

Before joining the team at United Way, Sara served as Vice President of Human Resources for EDENS Investment Trust for more than 12 years. In her role, Sara provided executive HR leadership to one of the largest privately-held commercial real estate development companies in the United States, supporting 265 employees in 10 offices nationally. During her time there, she led recruiting and onboarding processes as the company grew by 51 percent over 10 years.

Sara began her career with Wachovia Bank (now Wells Fargo), where she spent 14 years. She served in a variety of banking and human resources roles, including in the corporate banking, insurance and wealth management division of the company. Sara is a long-time volunteer and supporter of United Way of the Midlands, having volunteered her time and expertise on both the resource development and community impact arms of the organization. Her roles have included a membership on the Board of Directors, Co-chair of the Campaign Committee, Chair of the Community Impact Committee and Chair of the Financial Stability Council.

During her time as Co-chair of the Campaign Committee, she co-led a team of 30 volunteers responsible for raising $22 million over two years. As Chair of the Community Impact Committee, she led a team of 25 volunteers with oversight of $4 million in community investment and $2 million in grants and community initiatives.

Sara has earned multiple awards, including being honored as one of Columbia Regional Business Report's 2019 Women of Influence. She was also recognized as an “Icon” as part of the 2021 Columbia Regional Business Report’s Icons and Phenoms list. Sara holds a bachelor’s degree in economics from the College of William and Mary.

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AMELIA GAINEY, DIRECTOR, DIGITAL HEALTH SERVICES, PRISMA HEALTH

Amelia earned an undergraduate degree in Finance from the Darla Moore School of Business and a master's degree in health administration from the University of South Carolina.

JAMES T. IRVIN, III, PARTNER AT NELSON MULLINS

Jim practices complex business litigation, product liability, and class action defense. Many of these matters involved complex electronic discovery challenges, which Jim leverages to advise clients on electronic discovery strategies. He has tried cases to verdict in state and federal courts and litigated cases across the country.

Jim earned his JD from the South Carolina School of Law and has been recognized by Chambers USA: America's Leading Lawyers for Business and The Legal 500. He is involved in the community through City Year Columbia and United Way of the Midlands, as well as acting as the Chair of several professional associations and committees including the South Carolina Defense Trial Attorneys Association.

CHERYL HOLLAND, PRESIDENT & FOUNDER OF ABACUS PLANNING GROUP

Cheryl R. Holland, CFP® is the Founder of Abacus Planning Group, a holistic financial advisory firm that primarily serves entrepreneurial families with shared assets. Abacus manages over $1,700,000,000 in assets with offices in Columbia, SC, Greenville, SC, and Fredericksburg, TX.

RICHARD SLATER, VICE PRESIDENT OF SALES AND MARKETING AT SOUTHEASTERN FREIGHT LINES

Richard grew up in Columbia, SC, and graduated from the University of South Carolina in 2011. He works at Southeastern Freight Lines as their SVP of Sales and Marketing. Richard leads multiple community service projects a year through Southeastern's outreach arm, "Southeastern Serves". He is also responsible for leading Southeastern's United Way Campaign.

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Richard and his wife, Molly, have been married for 9 years and have 3 children, Maggie (7), Becca (5), and Graham (4). Both Richard and his wife are active members at their church, Eastminster Presbyterian, where Richard serves as a Deacon and Molly is active in the children's ministry.

DREW STEVENS, PRIVATE WEALTH ADVISOR AT G3 WEALTH ADVISORS (NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP)

Drew Stevens joined Northwestern Mutual as an intern in 2008 while attending the University of South Carolina and graduated with a double major in Corporate Finance and Risk Management in 2010. Drew is a securities licensed, insurance agent, CERTIFIED FINANCIAL PLANNER™ (CFP®) professional, Retirement Income Certified Professional (RICP®), Registered Investment Advisor and holds the Chartered Life Underwriter (CLU®) designation. Born in New York, Drew grew up on Hilton Head Island and intends to call Columbia, SC home for the rest of his life. He serves with the Darla Moore School of Business Alumni Board and the Business Partnership Foundation, The United Way of the Midlands Board and multiple committees, and The American Heart Association (of the Midlands). He and his team are dedicated to serving clients at the highest level, providing retirement planning (specifically, tactical wealth distribution), estate and insurance planning, tax mitigation planning, college funding, and asset management.