

## Financial Services Forum



### Speaker Biographies (alphabetical by last name)

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#### **David L. Beam**

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David's practice encompasses a broad range of matters related to financial services. His focus is on payment systems and credit products, with an emphasis on legal issues that arise from the innovative use of technology in financial services.

In 2019, *Chambers Fintech* ranked David among the top five lawyers in the United States in the area of Payments & Lending. In 2018, David was among ten lawyers worldwide selected by *Chambers Fintech* for inclusion as ranked lawyers in the area of Payments Law. In September 2018, the *National Law Journal* included David on its inaugural list of Cryptocurrency, Blockchain and Fintech Trailblazers for his work at the intersection of finance and technology. *Super Lawyers* magazine also named David a rising star in Washington DC, 2013-2015.

Full bio [here](#).

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#### **Marcus A. Christian**

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Marcus Christian is a Washington DC partner in Mayer Brown's Litigation & Dispute Resolution practice and White Collar Defense & Compliance group. He also is a member of the firm's Cybersecurity & Data Privacy practice. Since joining Mayer Brown in 2013, Marcus has represented clients in matters involving data security planning, board governance of cybersecurity, cyber fraud, data breach response, and congressional investigations, among others.

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### **Thomas J. Delaney**

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Tom Delaney is co-leader of Mayer Brown's Global Financial Services Regulatory & Enforcement practice. He assists both US and international firms anticipate and resolve regulatory, supervisory and structural impediments to their corporate objectives. Tom oversees the conduct of internal investigations and defends financial services firms that are the subject of enforcement proceedings and Congressional investigations. In addition to financial services firms, Tom has advised foreign governments on their establishment of regulatory and enforcement systems that conform with international standards, including those specified by such bodies as the OECD's Financial Action Task Force.

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### **Matthew F. Kluchenek**

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Matthew Kluchenek is a partner in the Chicago office. Matt has a broad-based derivatives practice in which he counsels financial institutions, asset managers, trading advisors, trading firms, fintechs, brokers, and exchanges with respect to CFTC and SRO enforcement, regulatory and transactional matters involving futures, options, swaps, forwards and cryptocurrencies. Mr. Kluchenek also serves as an adjunct professor at Northwestern University Pritzker School of Law, where he teaches the course on Derivatives Law.

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### **Brad L. Peterson**

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Brad Peterson is a partner in the Chicago office and leads Mayer Brown's global Technology Transactions practice.

Brad's practice focuses on data, digital, outsourcing and software transactions, with a particular emphasis on financial technology. His experience includes data licensing and analytics; digital services such as IaaS, PaaS, and SaaS; outsourcing of the full range of information technology (IT) and business process functions; and core systems modernization, ERP and other software licensing, development and integration transactions. His experience also includes projects in emerging technologies such as artificial intelligence (AI), robotic process automation (RPA), and blockchain and other distributed ledger technologies (DLTs).

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### **Anna T. Pinedo**

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Anna Pinedo is a partner in Mayer Brown's New York office and co-leader of the Capital Markets practice. She concentrates her practice on securities and derivatives. Anna represents issuers, investment banks/financial intermediaries and investors in financing transactions, including public offerings and private placements of equity and debt securities, as well as structured notes and other hybrid and structured products.

In the derivatives area, Anna counsels a number of major financial institutions acting as dealers and participants in the commodities and derivatives markets. She advises on structuring issues as well as on regulatory issues, including those arising under the Dodd-Frank Act. Her work focuses on foreign exchange, equity and credit derivatives products, and structured derivatives transactions. Anna has experience with a wide range of transactions and structures, including collars, swaps, forward and accelerated repurchases, forward sales, hybrid preferred stock and off-balance sheet structures. She also has advised derivatives dealers regarding their Internet sites and other Internet and electronic signature/delivery issues, as well as on compliance matters.

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Elizabeth (Libby) Raymond is an M&A partner and co-head of the Financial Institutions M&A and Fintech groups. She focuses on M&A for financial institutions, including commercial and investment banks, finance companies, insurance companies, asset managers and broker-dealers, and private equity and hedge funds that invest in financial service businesses. She works closely with the firm's Banking & Finance, Financial Services Regulatory & Enforcement and Consumer Financial Services practices as well as the Technology Transactions group to provide the financial product and transaction experience that is central to financial institutions and fintech companies. She has a thorough understanding of the underlying financial products and services of financial institutions and fintech companies, including the structures, risks and regulatory issues that relate to these financial products and services, and the intersection of financial products and technology. Her recent transactions include domestic and international purchases and sales of, and investments in, businesses relating to commercial finance, auto finance, mortgage origination and servicing, online auto and consumer lending, unsecured consumer lending, credit cards, and insurance brokerage and services.

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Melissa Richards, CMB is a California licensed attorney specializing in financial services compliance and licensing, enforcement defense, and enterprise risk management matters. Ms. Richards has almost 30 years of both General Counsel and private practice experience. Most recently, she served as the Chief Legal & Risk Officer of CMG Financial, a national mid-size independent residential mortgage banker. At CMG, she actively managed all legal, corporate governance and real estate matters for the company. Ms. Richards also established the company's formal compliance, licensing, risk management and QC programs.

Ms. Richards has served in leadership for the California Mortgage Bankers Association, both as a three-term Director (1997-2006) and as its General Counsel (2002-2008). In 2019, Ms. Richards is serving as leader of CMBA's Member Task Force on the Cal Consumer Protection Act. For the Mortgage Bankers Association, Ms. Richards received her Certified Mortgage Banker designation in 2009 and serves on multiple committees.

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David Sahr advises domestic and foreign financial institutions on establishing and expanding their operations in the United States as well as on related regulatory, enforcement and compliance matters. He represents banks and their affiliates before federal and state agencies, including the Federal Reserve Board, the Office of the Comptroller of the Currency, the Federal Deposit Insurance Corporation and the Securities and Exchange Commission. He assists financial institutions in the development and sale of new products including compliance with state and federal banking, securities and commodities laws. David also advises and represents foreign banks on federal legislative developments affecting their US banking and non-banking operations.

David has worked closely with banks and trade associations on the Dodd-Frank Wall Street Reform and Consumer Protection Act (Dodd-Frank). He has advised numerous clients on their response to the regulatory implementation of Dodd-Frank, including drafting comment letters on new capital rules, the Volcker Rule and new derivatives regulations.

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### Jeffrey P. Taft

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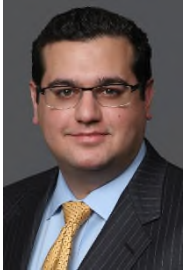
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Jeffrey Taft's practice focuses primarily on bank regulation, bank receivership and insolvency issues, payment systems, consumer financial services and cybersecurity/privacy issues. He has extensive experience counseling financial institutions, merchants, technology companies and other entities on various federal and state banking and consumer credit issues.

Jeff regularly represents banks, finance companies, trust companies and other financial service providers on regulatory matters, including the development and operation of multi-state fiduciary, deposit and lending programs. He has also advised banks, merchants, technology companies and financial services companies on issues relating to credit cards, debit cards, gift cards, virtual currency, wire transfers and ACH transactions and other mobile payment products.

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Donald Waack counsels globally active financial services firms on their most challenging regulatory, transactional, and enforcement matters. Don devotes the majority of his practice to advising banks, bank holding companies, and other financial institutions on complex strategic and regulatory matters, including investment authority issues and activities restrictions; regulatory capital; swaps market regulation; affiliate transactions and lending limits; and proprietary trading and private fund restrictions arising under the Volcker Rule. He assists financial services clients with structuring significant investments and provides strategic advice and regulatory support for mergers and acquisitions and other complex transactions. Don also counsels hedge funds, private equity funds, and other firms regarding investments in the commercial banking sector and transactions with banks and other regulated counterparties. In connection with his regulatory counseling practice, Don works frequently with the staffs of the major federal and state bank regulatory agencies.

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Jason Wagenmaker focuses his practice on mergers and acquisitions and general corporate counseling and representation. He represents buyers and sellers in connection with stock and asset acquisitions and divestitures, public and private mergers, joint ventures and similar transactions. He has represented U.S. and multinational clients, both publicly and privately held, in a variety of industries. In 2016, Jason was named a "Client Service All-Star" by *BTI Consulting* and was also named by *Leading Lawyers* as an Emerging Lawyer in the area of Mergers & Acquisitions.

Full bio [here](#).