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Feb. 26, 2016

Hilltop Holdings Completes Merger

Hilltop Holdings Inc. recently announced the merger of its broker-dealer subsidiaries FirstSouthwest Company LLC and Hilltop Securities Inc. (formerly Southwest Securities, Inc.) to form **HilltopSecurities**. The firms have a combined 100 years of history in Texas in the financial services industry. Hill A. Feinberg, former chairman and CEO of FirstSouthwest, will serve as chairman and CEO, and Robert W. Peterson, former president and CEO of Southwest Securities, will serve as president and COO. John R. Muschalek, formerly head of correspondent clearing and securities lending at FirstSouthwest, will serve as Chief Administrative Officer, and J. Michael Edge, former CFO of SWS Group, will serve as CFO. Jack Addams and David Medanich will lead the Public Finance team and Daniel Leland will lead Capital Markets. Retail Brokerage will be led by David Geschke and Structured Finance will be led by Michael Marz. Lana Calton will lead Clearing Services and Lisa Palmeri will lead Securities Lending.

Katz, Sapper & Miller Names New Director of Valuation and ESOP Services Groups

Katz, Sapper & Miller recently named Robert C. Hilton, ASA as Director in its Valuation and ESOP Services Groups. Hilton has performed hundreds of valuations for operating and holding companies, partnerships and limited liability companies. He specializes in the valuation of covenant-not-to-compete and non-solicitation agreements. Hilton received his Bachelor of Arts degree in chemistry and psychology from Emory University and a Master of Business Administration degree from the University of Rochester's William E. Simon Graduate School of Business Administration.

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Valuation Advisory Services Practice, currently based out of the firm's centers of excellence in New York and Chicago. Richman has more than 30 years of experience in business valuations, mergers and acquisitions and other financial and tax consulting matters.

PKF Texas Directors Appointed Leadership Roles in the Houston Business Community

[Pannell Kerr Forster of Texas, P.C.](#) recently announced the appointment of several directors to key leadership roles within the business community:

- Kenneth Guidry, CPA, President, was appointed to Chair of the Audit and Risk Committee of the Greater Houston Partnership, an organization focused on Houston's growth and future.
- Ryan Istre, CPA will serve on the leadership team of the Greater Houston Partnership's Business Development Program.
- Chris Hatten, CPA was appointed as Treasurer of the Young Professional's Board for the Turnaround Management Association's Houston chapter. TMA seeks to strengthen the global economy through turnaround management, corporate restructuring and distressed investing.
- Michael Veuleman, CPA is a board and executive committee member, as well as the treasurer for the East End Chamber of Commerce.

Scheffel Financial Services Principal Named St. Louis Best Wealth Manager

[St. Louis Small Business Monthly](#) selected Jeff Westerhold, MBA, CFP, CLU, as one of the St. Louis region's "Best Wealth Managers." Westerhold is principal of [Scheffel Financial Services](#) and has more than 25 years of financial services experience. He received his bachelor's degree in Finance from Eastern Illinois University. He also holds a MBA.

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that have operations in multiple international and domestic locations. He received his Bachelor of Science in Accounting and a Masters of Taxation from Arizona State University.

Joseph Eve CPAs Expands Staff

[Joseph Eve CPAs](#) recently announced the addition of April Bacon as an advisory consultant. In her new role, Bacon will be responsible for helping organizations improve their accounting and finance functions through the use of cloud-based software and improved processes. She has more than 14 years of direct operational experience in the Indian gaming industry. Bacon earned her Master's in Business Administration – Accounting at Bellevue University.

Bill.com Appoints New Senior Director of Channels and Alliances

[Bill.com](#) recently announced that it has hired Bob Lewis, CPA as its senior director of channels and alliances. Lewis has more than 20 years of experience in sales, marketing, business development and channel management in accounting. He will also lead the accounting channel sales team. Lewis has been selected twice as a *CPA Practice Advisor* "Top 40 Under 40." He earned his bachelor's degree in accounting from Santa Clara University.

PKF O'Connor Davies Expands O'Connor Davies Administration Practice

[PKF O'Connor Davies, LLP](#) recently announced that its subsidiary O'Connor Davies Administration, LLC has formed an alliance with VBK+CO. VBK+CO's international knowledge and expertise will increase the PKF O'Connor Davies' footprint in the family office and alternatives industry.

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