

Jeff Ellis
Crosstree Capital



Topic: "The M&A Process and the Role of a Financial Advisor"

Education: Bachelors of Science in Finance from the University of Florida and a Masters in Business Administration from the University of South Florida

Prior to co-founding Crosstree Capital Partners, Mr. Ellis was a Vice President in Bank of America's Financial Strategies Group where he raised debt financing and provided advisory services to equity sponsors pursuing leveraged buyouts.

Before working with Bank of America, he was an Associate in the Mid-Cap Investment Banking Group at Banc of America Securities where he was responsible for developing, structuring and executing mergers and acquisitions, public and private equity, mezzanine finance, high yield debt, high grade debt, private debt, syndicated bank debt, interest rate and equity derivatives, sale-leasebacks and various other products and advisory services for mid-cap clients across the Southeast U.S. Mr. Ellis began his career in mergers and acquisitions with a subsidiary of Citigroup Global Markets.

Mr. Ellis holds a Bachelors of Science in Finance from the University of Florida and a Masters in Business Administration from the University of South Florida. Mr. Ellis is a Chartered Financial Analyst charter holder and member of the Chartered Financial Analyst Institute.