

WE'RE OFF TO THE CREDIT RACES!



2026 REGIONAL MEETINGS WISCONSIN: *BIOGRAPHIES*



**ECONOMIC UPDATE:
NAVIGATING THE MARKETS**
**Brian Jacobsen, Chief
Economist, Annex Wealth
Management**

Brian Jacobsen is Chief Economist of Annex Wealth Management. As Chief Economist, Brian provides insight

and leadership to Annex's clients and its Investment Committee, which guides client portfolio construction and investment philosophy. An accomplished writer and speaker, Brian's perspective and expertise have been featured nationally on networks like CNBC and Bloomberg. He has also appeared on Annex's "Money Talk" weekly radio program in the past.

Brian scored an academic hat-trick by attending the big three universities in Wisconsin, earning a Bachelor's Degree in Finance from the University of Wisconsin-Madison, a Ph.D. in Economics from the University of Wisconsin-Milwaukee, and a law degree from Marquette University Law School. Brian has earned the right to use the Chartered Financial Analyst (CFA®), the Certified Financial Planner (CFP®), the Chartered Alternative Investment Analyst (CAIA®), and the Certified Business Economist (CBE®) designations. Before working at Annex Wealth Management, Brian worked as a Senior Investment Strategist and as a Chief Portfolio Strategist. He was also an associate professor at Wisconsin Lutheran College. In his spare time, Brian is an Instructor of Practice at Marquette University.



**THE ROLE OF A CREDITORS'
COMMITTEE AS A
COUNTERWEIGHT TO THE
DEBTOR AND SECURED
LENDER: WHAT YOU NEED
TO KNOW**
**LINDSAY SKLAR, Senior
Counsel, Lowenstein Sandler**

Lindsay Sklar helps clients navigate financial restructurings with creative strategies designed for maximal recovery. She represents creditors' committees, individual creditors, debtors, liquidating trustees, and other interested parties in complex Chapter 11 cases and related adversarial proceedings. Her Chapter 11 representations have included creditors' committees across a broad range of industries, including retail, paper, manufacturing and industrial, pharmaceuticals, and more. Prior to joining Lowenstein, Lindsay's practice centered on representation of fiduciaries and trustees in Chapter 7 bankruptcy matters. Notably, she represented the SIPA liquidation trustee of Bernard L. Madoff Investment Securities LLC.



THURSDAY, MAY 21ST, 2026



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AUTOMATION – DON'T BE AFRAID – EMBRACE IT!

BOB O'BRIEN, *Global Alliances & Partnership Solutions Manager, Dun & Bradstreet*

27 years of working with Credit Professionals from Fortune 100 companies to Small Businesses.

Primarily focused on helping Finance departments become for efficient and Mitigate Risk while helping Sales grow. My experience of helping Credit Managers automate processes and utilizing Data and Predictive Scoring to get orders out quicker and money in the door quicker. Currently managing the NACM Partnership with DNB to provide members with solutions that fit their needs and provide a high level of service.



BEING INTENTIONAL WITH CREDIT RISK RETENTION AND RISK TRANSFER

John Cornell, *Founder, Crescendo Trade Risk*

John Cornell is the Founder of Crescendo Trade Risk, a specialty trade credit insurance brokerage built

on a simple belief: people are smart, and nobody likes being sold to—especially about insurance. He's known for mixing straight talk with dry humor. Before launching Crescendo, John was an asset-based lender, where he learned the fastest way to understand a business is to watch what happens when customers don't

pay. That experience permanently cured him of optimism-based credit decisions and taught him that cash flow is the KPI that never lies.

John later spent nearly a decade with Allianz Trade, the world's largest insurer of trade receivables. There, he saw firsthand how credit insurance works when it's done right—and how it doesn't when it's rushed, oversold, or forced to fit a carrier's quarterly goals.

At Crescendo Trade Risk, John takes a different approach. He doesn't push companies to buy insurance. He assumes they'll buy on their timeline, not the carrier's—and when they do, he plans to have them be around for decades. The focus isn't closing deals; it's building long-term partnerships that help companies sell more, sleep better, and avoid learning credit lessons the expensive way.

2026 REGIONAL MEETINGS

APRIL 7 – KANSAS CITY
APRIL 8 – CINCINNATI
APRIL 9 – WICHITA
APRIL 14 – GRAND RAPIDS
APRIL 16 – DETROIT
APRIL 21 – INDIANAPOLIS
APRIL 23 – CHICAGO

MAY 5 – PITTSBURGH
MAY 6 – FT. WAYNE
MAY 7 – CLEVELAND
MAY 12 – BUFFALO
MAY 14 – WORCESTER
MAY 19 – OMAHA
MAY 21 – MILWAUKEE



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