



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Nancy Berkowitz

Industry Vice President
Dimensional Insight

Nancy Berkowitz is the Industry Vice President of Dimensional Insight, a software, data management, and service provider with a focus on Beverage Alcohol. Nancy started her career at the Gallo Wine Company as a sales rep in Southern California. She then went on to work at Florida Beverage Corporation and United Distributors of Massachusetts in management roles. While at Renfield Importers, Nancy was the Marketing Brand Manager for Gordon's Gin and Vodka, Mommessin wines, and other prestigious brands. Nancy then started an importing/marketing company with her family, which eventually became Marie Brizard Wines and Spirits. After selling to Marie Brizard and working at the company for a while, Nancy left to become the Marketing Director at Stimson Lane (Ste Michelle Estates). Berkowitz also served as President of John Drew Brands. Dimensional Insight hired Berkowitz to help build their Beverage Alcohol team which she continues to do today.



Jim Harris

Vice President of Sales
Inventiv Software

Jim Harris is the Vice President of Sales for Inventiv Software, a privately held company specializing in software and data services for the wine and spirits industry. Jim manages all aspects of sales and marketing for Inventiv including new product launches. Previously, he was the Vice President of Sales and co-founder of GBI, a depletions and account sold reporting service provider working with a variety of suppliers. At GBI Jim was instrumental in creating the Wine Consortium, a group of ten wine suppliers working together to share accounts sold information to find distribution opportunities and analyze sales trends by varietal and price points. During his time at GBI, Jim developed a partnership with Beverage Data Network (BDN) and he has an excellent understanding of the information needs of both wholesalers and suppliers. Jim lives with his wife and two children in Nashville, Tennessee. He has a BA in Political Science from the University of Richmond and an MBA from Vanderbilt University.



Aman Hussain

Partner
Kearney

Aman Husain has over 20 years of consulting and industry experience working with global CPG companies. His focus is on RTM, Digital Platforms, sales and digital transformations that drive top-line growth and sales force effectiveness. Aman's areas of expertise include revenue management, trade spend, digital platforms, e-Commerce, advantaged go-to-market, sales and operations planning, growth and strategic planning, sales force automation and redesign. Aman has his BSc from the University of North Texas and his MBA from NYU Stern.



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Danelle Kosmal

**Vice President, Beverage Alcohol Practice
NielsenIQ**

As Vice President of NielsenIQ's Beverage Alcohol Practice, Danelle leads industry thought leadership and best practice solutions for beer, wine, and spirits clients, industry groups, and the media. She is committed to leveraging NielsenIQ's breadth of resources to provide an integrated and holistic understanding of consumer behavior and retail trends. Danelle has 23 years of marketing experience, and has been with Nielsen for 16 years. She has experience working across various clients in the food, beverage, and consumer goods industries, with

the past 9 years focused on alcohol. Prior to joining the Beverage Alcohol Practice, Danelle led NielsenIQ's business at Molson Coors in Chicago. Danelle received her MBA from the University of Pittsburgh, and her BA in International Studies and Economics from Allegheny College in Pennsylvania.



Andrew Levy

**Head of Strategic Partnerships
Provi**

Before joining Provi, Levy was VP of Sales Enablement and Distributor Development for Constellation Brands—the third largest brewer in the US. Throughout his career at Constellation Brands, Levy drove strategies to employ technology at the intersection of all three tiers. He brings to Provi his experience developing training programs and digital tools to highlight distribution and in-market execution opportunities for distributors and internal teams, driving year-over-year growth in placements and space-gains. Levy also spearheaded the

implementation of data-driven analytics and sales strategies for Constellation Brands' 500+ distributor network and thousands of sales representatives.



Josh Nacht

**Senior Consultant
The Family Business Consulting Group**

Joshua Nacht is a senior consultant with The Family Business Consulting Group; he works with business families to create structured plans for continuity by focusing on effective governance, communication, and transitions. He is adept at working with multigenerational families to integrate diverse perspectives into successful strategies. Joshua connects well with people, and he highly values the collaborative relationships and trust that are built in his work with business families.

Joshua has written and presented on a range of issues including next-generation leadership development, managing multiple roles, incorporating married-ins, and running effective family meetings. He is the co-author of the book *Family Champions and Champion Families*, which explores the value of family leaders in creating enduring business family success. *(continued next page)*



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS

Joshua's 2015 dissertation research, "The Role of the Family Champion" investigated leadership within the ownership group of business families and won the 'Best Dissertation Award' from the Family Firm Institute in 2016. Prior to his doctorate, Joshua led wilderness skills trips and worked as a counselor with individuals and families.

Joshua lives in Lyons, Colorado where he enjoys cooking, listening to music, mountain biking, and nature excursions with his children.



Michael Roe

Senior Account Executive
DMW&H

Michael Roe is the voice and leader in the new generation of material handling professionals, one that focuses on the next generation. With 9 years of material handling experience, Michael has a strong grasp on the industry, creative solutions, and understanding of the new trends and technologies, and has led not only DMW&H in a new direction, but also the rest of the industry. Michael is a Quick Growth expert who focuses on e-commerce businesses.

Michael's industry knowledge and outgoing personality have molded him into a recognized figure in the material handling industry. He is part of an up-and-coming generation of supply chain experts that leverage new technologies and ideas to generate superior results. He is a regular speaker at both national and regional events including: ProMat, CSCMP, MODEX, NAIOP, etc. Michael's ability to explain trends, new technologies and best practices have made him a sought-after speaker at conferences and trade shows. He is also often requested for interviews and comments by media outlets for editorial content. Michael is also an MHI Outstanding Young Professional Finalist and a SDCE 2017 Pro to Know. Michael is a graduate of Auburn University.



Danielle Shoots

Founder & CEO
The Daily Boss Up

Danielle Shoots is the Founder and CEO of the Daily Boss Up, a digital startup that provides coaching, mentoring and consulting for leaders at every stage of their professional development. A proud Colorado native, Danielle is a graduate of the University of Colorado at Denver, where she earned a degree in Business Administration. Danielle is also the Vice President and Chief Financial Officer for The Colorado Trust, a private health equity foundation supporting Colorado communities.

At the age of 26, Danielle embarked on her executive leadership path ascending to the position of Chief Financial Officer (CFO) for the Colorado Department of Public Health and Environment. After the state, Danielle served as the Vice President of Finance and Business Operations for the West Division of Comcast, managing a billion-dollar capital portfolio and a team of sixty employees located in seven states. *(continued next page)*



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS

Danielle's passion for people and leadership, distinguished business acumen and tenacious work ethic have garnered her numerous accolades, including inclusion on the prestigious 2019 list of the Top 25 Most Powerful Women in Business from the Colorado Women's Chamber of Commerce, The 2020 Emerging Leader in Philanthropy from ABFE, The 2018 Woman of the Year Award for her work with youth in the community, and a recipient of the 2017 Denver Business Journal's 40 Under 40 award.

Often the youngest executives in the boardroom, Danielle possesses a unique insight on leadership dynamics, millennial engagement and handling the nuances of a rapidly evolving workforce. From entrepreneurial Tech CEO's to VP's of Fortune 500 companies; people from diverse industries seek out Danielle to network and think-tank ways to improve their organization. Danielle's distinct industry perspective has made her a highly regarded Keynote speaker. During her remarkable career, she has been featured at TedxMileHigh, Women of Telecommunications Tech It Out Talk, the Black Women Lead Summit and The Women of Denver Summit - to name just a few.

Danielle is a passionate community member and serves as a Trustee for the Women's Foundation, an appointed Board member for the Prosper Denver Fund and a member of Senator Coleman's labor and technology cabinet.



Dale Stratton

Analyst
SipSource

Dale Stratton brings over 35 years of experience in the Beverage Alcohol Industry to his role as an independent consultant. Dale retired from Constellation Brands in 2019 where he was the Vice President, Commercial Insights working across their Beer, Wine, and Spirits divisions. While at Constellation Brands he oversaw consumer and shopper insights, consumer affairs, business analytics, market research, category management initiatives and the wine sensory program. Dale's extensive work linking consumer/shopper insights and market analysis with

business objectives and strategies enable him to translate insights into profitable action.

Dale is currently involved in projects with Azur Associates, Emetry, The Wine & Spirits Wholesalers of America's SipSource Report, and is President of the Wine Market Council.

Prior to joining Constellation Brands in 2006, Dale spent 22 years working at E&J Gallo where he began his career. During his tenure, he covered a wide range of responsibilities that included distributor management, account management, insights and Lean Six Sigma.

Dale has a bachelor's degree in Journalism with a concentration in Public Relations from Colorado State University and an Executive MBA from Tuck School of Business at Dartmouth College.



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Katie Thomas

Lead

Kearney Consumer Institute

Katie Thomas has built her career around understanding consumers - what makes them tick, how to meet their needs, and why they are so fiercely loyal to Heinz ketchup, amongst other things. Katie's career began in management consulting at Kearney, working on projects across consumer goods, retail, and media with leading Fortune 500 organizations. Intent on managing brands directly, Katie shifted gears after post-MBA, moving into brand marketing and management for beloved brands from Heinz to Hillshire Farm and Aidells chicken sausage.

Returning to Kearney to lead the Kearney Consumer Institute, she is dedicated to acting as an advocate for the consumer, ensuring that their spoken and unspoken needs be the primary lenses for examining all consumer-facing industries.



Gianfranco Verga

President and Co-Founder

SevenFifty

Gianfranco Verga is a co-founder and the Chief Operating Officer of SevenFifty. With extensive experience in multiple areas of the beverage industry, Verga is widely considered to be a leading expert in the field. As COO of SevenFifty, Verga oversees the company's day-to-day operations, including the external client management of over 700 distributors and 30,000 buyers, as well as the internal management of SevenFifty's sales and customer care teams.

Prior to co-founding SevenFifty in 2012, Verga managed operations and development at Tippling Bros, a beverage consulting firm that curates spirits portfolios for buyers and distributors. Before joining Tippling Bros, Verga worked as the Beverage Director and General Manager of Louis 649, building one of the most established beverage programs in New York City. Prior to his time at Louis 649, Verga worked as a Marketing Director at Domaine Select Wine Estates.

Verga is B.A.R. Smarts certified by the Beverage Alcohol Resource and has been featured in numerous food and beverage publications. He received a B.A. from the Stern School of Business at New York University.



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Smoke Wallin

Chairman, Co-Founder

Vertical Wellness

Smoke Wallin is a highly accomplished CEO, entrepreneur, leader and board member and philanthropist with more than 25 years of success across the consumer products, beverage, distribution and technology industries.

Smoke serves as Chairman & CEO and Co-Founder of Vertical Wellness a leading Hemp & CBD brand company and Vice Chairman of VertCos -MIH – a leading cannabis business in CA. VWEL recently announced an agreement to merge into publicly traded Canafarma Hemp (CSE: CAN) with Smoke taking over as the combined companies CEO. Smoke also serves on the board of publicly traded cannabis investment firm, Vencanna (Canadian Stock Exchange (VENI. CN)). He serves as Chairman of Taliera, a company he founded in 2006 to incubate and celebrate iconic brands. He is also a Senior Advisor to STS Capital.

Throughout his entrepreneurial career, Smoke has founded and built multiple companies, teams and brands. Smoke helped build National Wine & Spirits (now partnered with RNDC) into one of the largest distributors of beer, wine and spirits in the US with over \$1 billion in beverage sales, 1500 employees and 350 trucks serving more than 36,000 retail accounts. Smoke's clients, partners and companies have included 100s of distribution, wine, spirits, beer and non-alcoholic beverage clients globally. He has overseen >\$1.7 billion in M&A, deals and financings, publicly and privately, for his companies and created \$100s of millions in value for stakeholders.

Smoke served as Chairman & President of the Wine & Spirits Wholesalers of America (WSWA) and on the board for 7 years. He served as the first Chairman of the Counsel for Leadership Development which he helped created for WSWA. He served on the Board of the Hemp Roundtable and the Craft Brewer's Association. He serves as Chairman of the Global Beer Wine & Spirits Network (10 yrs) for the Young President Organization and serves on the executive board for the YPO Hospitality Network with over 3,000 CEOs. He serves as Learning Officer and Board member for YPO's Pacific One chapter. He founded the Wine Industry Technology Symposium and Wine2.0.

Smoke is Co-Founder of DignityMoves.Org a group of business leaders who came together to help fight the growing homelessness crisis. He also served on the American Freedom Fund's Board whose mission is "to empower Veterans through athletic, educational, and advocacy programs in Washington, D.C. and across America.". Passionate about entrepreneurship and economic education, Smoke served as Chairman of the Board for Junior Achievement of Indiana and the Experiential Learning & Entrepreneurship Foundation (ELEF) and on the boards for a combined 17 years. Smoke also served as President of the Vanderbilt University Business School Alumni Board and on the board for 12 years.

He regularly contributes to CNBC's Fast Money, Closing Bell and Nightly Business Report, Fox Business Varney & CO, CNN's Headline News, The Street, Yahoo Finance TV, CheddarTV, and in Bloomberg, Forbes, MarketWatch, Politico, the Wall Street Journal. He frequently speaks and teaches classes at The Art Center School of Design (Pasadena), Cornell, Dartmouth, Syracuse, USC, and Vanderbilt and, at conferences. Recognition includes the EY Entrepreneur of The Year, IBJ's "Forty under 40", and the Vanderbilt Business "Distinguished Alumni Award" and he was named one of the 100 most influential leaders in the cannabis industry by High Times Magazine.

Smoke earned an MBA from Vanderbilt University and a BS in Agricultural Economics from Cornell University's Dyson School of Applied Economics a part of the Cornell SC Johnson College of Business. He is an Eagle Scout and the father of two Eagle Scout sons and two amazing daughters, who all, most importantly, are good humans. He lives with his singer/songwriter wife Anitra in Ventura, CA..



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Danny Wirtz

Vice Chairman
Breakthru Beverage Group

As Vice-Chairman of Breakthru Beverage Group, Danny Wirtz serves on the company's Board of Managers and works closely with the CEO and executive management on integration, strategic planning and supplier relations. A skilled leader with a proven track record of success, Danny leads with passion and a commitment to the future of the organization.

As a fourth-generation family leader, Danny assumed this position from President and CEO of Wirtz Beverage Group where he oversaw day-to-day leadership of the company's domestic and international businesses. He has served in a variety of roles for Wirtz Beverage including oversight of the company's commercial teams, corporate strategy and supplier relations.

Danny became Chief Executive Officer of the Chicago Blackhawks in 2021 after serving as Interim President for nine months. Prior to these roles he held the role of Vice President. He is also an alternate Governor to the NHL. As Interim President, Danny led the organization through the NHL's Hub City Return to Play, navigating the impacts of COVID-19 and establishing a new Vision for the organization - To Reimagine the Potential of Hockey. In addition, Danny represents the family ownership with the United Center Joint Venture.

Danny is an active leader in the Chicago community. In addition to his role as Vice Chairman of the Chicago Blackhawks Foundation, he is an active supporter of Chicago organizations addressing social justice and youth opportunity including BUILD and Christ the King Jesuit High School. He was recently appointed as a Board Member of Embarc Chicago. Danny was the immediate past Chairman of Wine and Spirits Wholesalers of America and serves on the association's Executive Committee.

Danny holds a vested interest in Wirtz Corporation and is a member of the Board of Directors where he provides strategic counsel to its diversified holdings which include the Chicago Blackhawks, Wirtz Realty and banking interests in Illinois and Florida. With the family's ownership interest in the United Center, Danny works with building management to help guide the campus evolution and development. In 2013, Danny launched the video production company, Banner, who have developed engaging content for leading brands from the Chicago Blackhawks and Chicago Cubs, to Conagra and Wilson Athletic. In 2018, Danny formed a partnership with former Pitchfork CEO and Creative Director, Chris Kaskie and Mike Renaud to form the creative studio and brand advisory team, Varyer.

Danny is a graduate of Boston College. He lives in Chicago with his wife Anne and two daughters, Rosemary (12) and Juniper (9).



WINE & SPIRITS WHOLESALERS OF AMERICA

2021 NEXTGEN SUMMIT

SPEAKER BIOS



Richard Wolkowitz

Vice President

The Family Business Consulting Group

The Family Business Consulting Group is proud to announce and welcome Richard J. Wolkowitz as its new vice president, serving as a primary resource for the family enterprise community and the advisors who serve them. Rich brings deep experience to his role, overseeing the firm's external growth, operations and key relationships.

"Over 25 years, Rich's career has made him a leader, advisor and key confidant to a range of family businesses and family offices," said Kristi Daeda, the firm's president. "His unique perspective and energy for their opportunities and challenges will be a great asset to FBCG as we continue to serve families across North America and globally in new ways."

Rich has been immersed in the family business field in a wide variety of professional, leadership and management capacities working in and advising families. He was a partner for a national law firm representing closely held businesses and their respective executives and family-owned enterprises and their families. He also brings a depth of family office expertise to this position, having served in the fiduciary role for both a single-family office and a multi-family office with operating business portfolios in retail, finance, manufacturing, technology, insurance, wealth management and real estate.

In addition to advising family enterprises, Rich served as a third-generation member and business leader of his family's multi-state automotive dealership network and finance firms with an embedded family office.

"Families and their family enterprises are uniquely complex and fuel the global economy providing jobs, opportunities and a great deal of philanthropy to further support local communities," said Richard. "Hence, there is nothing more professionally rewarding to me than playing a leadership role at FBCG — the family and family enterprise industry standard-bearer — to help my colleagues and our family clients achieve a more purposeful life by maximizing the connectivity between the family and the family enterprise."