

## ORIX Corporation USA Group Announces 2023 Promotions

ORIX USA Group announced the following promotions for this year across Boston Financial, Lument, NXT Capital and ORIX USA. The firm's leadership and business line managers identified and recognize these colleagues for their exemplary leadership, excellence and contributions to the Group. We congratulate all of them on their promotions and acknowledge their strong performance during their careers with the firm to date.

### Promotions effective May 1, 2023:

#### Managing Director

**Amy Chang**  
Investor Solutions,  
Asset Management  
ORIX USA

**Jennifer Cunningham**  
Fund Management  
& Reporting  
NXT Capital

**Lisa Grammatikov**  
Capital Transactions  
Boston Financial

**Santhosh Karunakar**  
Strategic Operations  
ORIX USA

**Joseph Levenstein**  
Leveraged Credit  
Portfolio Management  
NXT Capital

**Robin McInerney**  
Financial Operations  
NXT Capital

**Scott Phillips**  
ORIX Capital Partners,  
Private Equity  
ORIX USA

#### Senior Director

**Julia Allman**  
Underwriting  
NXT Capital

**Haley Barron**  
Accounting  
ORIX USA

**Timothy Hoppin**  
Deal Originations  
Lument

**Josh Land**  
Deal Originations  
Lument

**Brandon Pate**  
Production - Conventional  
Lument

**Dan Polaneczky**  
Underwriting  
NXT Capital

**Jonathan Souza**  
Accounting  
ORIX USA

**Whitney Spillman**  
Real Estate Technology  
Lument

**Mike Torreyson**  
Underwriting  
Lument

**Richard Urbano**  
Underwriting  
Lument

**Cesar Valadez**  
Municipal Finance &  
Infrastructure,  
Private Credit  
ORIX USA

**Tami West**  
Compliance  
ORIX USA

**Jacqui Wu Hsieh**  
Integrated Risk &  
Portfolio Management  
ORIX USA

**Blake Zhang**  
Growth Capital,  
Private Credit  
ORIX USA

## Director

**Amy Blackstone**  
Information Technology  
ORIX USA

**Margaret Callaghan**  
Underwriting  
NXT Capital

**Jason Christman**  
Production,  
Account Management  
Boston Financial

**Lindsay Cigole**  
Municipal Finance &  
Infrastructure,  
Private Credit  
ORIX USA

**Jose Esparza**  
Asset Management  
Lument

**Michael Flaherty**  
Production,  
Account Management  
Boston Financial

**Roberto Garcia**  
Investor Reporting  
Lument

**Eric Gordon**  
Municipal Finance &  
Infrastructure,  
Private Credit  
ORIX USA

**Matt Herrman**  
Underwriting  
Lument

**Conor Horan**  
Underwriting  
NXT Capital

**Daniel Jones**  
Production, Conventional  
Lument

**Bill Kalinowski**  
Production,  
Account Management  
Boston Financial

**Lucas Kowalewski**  
Underwriting  
NXT Capital

**Megan Leahy**  
Financial Planning  
& Analysis  
Boston Financial

**Davonne Lewis**  
Real Estate  
Asset Appraisal  
Boston Financial

**Madison Lewis**  
Real Estate Technology  
Lument

**Eric Major**  
Production,  
Account Management  
Boston Financial

**Mike McNeill**  
Production, Conventional  
Lument

**Brooke Pacelli**  
Client Services,  
Asset Management  
ORIX USA

**Dominic Porretta**  
Mergers & Acquisitions  
Lument

**Jonathan Roys**  
Loan Servicing  
Lument

**Austin Snyder**  
Equity Investment  
Management  
Lument

**Danna Taylor**  
Accounting  
Lument

## Associate Director

**Theodori Baltas**  
Financial Reporting  
NXT Capital

**Kevin Bernardo**  
Production,  
Account Management  
Boston Financial

**Eva Bieber**  
Asset Management  
Lument

**Lauren Callahan**  
Fund Management  
& Reporting  
NXT Capital

**Matthew Clark**  
Asset Management  
Lument

**Nicholas Contreras**  
Growth Capital,  
Private Credit  
ORIX USA

**Maureen Costello**  
Underwriting  
NXT Capital

**Louise DeSisto**  
Treasury & Custodial  
Cash Management  
Boston Financial

**Jenise Dixon**  
Asset Management  
Lument

**Jared Feldman**  
Fund Management  
& Reporting  
NXT Capital

**Mitchell Goldenberg**  
Production Analytical  
Support  
Lument

**Nicole Goodman**  
Production Analytical  
Support  
Lument

**Michael Groom**  
Sales & Trading  
Lument

**Adam Hiles**  
Sales & Trading  
Lument

**Amelia Hill**  
Asset Management  
Boston Financial

**Zach Jacobs**  
ORIX Capital Partners,  
Private Equity  
ORIX USA

**Wooyoung Jang**  
Accounting  
ORIX USA

**William Kokoruda**  
Asset Management  
Lument

**Derek Martin**  
Underwriting  
Lument

**Andrea Mayor**  
Accounting  
Lument

**Charlie Mildrum**  
Production Analytical  
Support  
Lument

**Elizabeth Moskaluk**  
Financial Controls  
Boston Financial

**Lauren Oliver**  
Accounting  
ORIX USA

**Patrick Quinn**  
Production Analytical  
Support  
Lument

**Julia Schottlaender**  
Asset Management  
Lument

**Shannon Thomson**  
Financial Controls  
Boston Financial

**JT Viesca**  
Underwriting  
Lument

**Christoph Wessel**  
Credit Opportunities,  
Private Credit  
ORIX USA

**Jared Wilson**  
Underwriting  
NXT Capital

**Madeline Zitka**  
Underwriting  
NXT Capital

## Senior Associate

**James Barlow**  
Production Analytical  
Support  
Lument

**Sam Brown**  
Fund Management  
& Reporting  
Boston Financial

**Connor Crush**  
Underwriting  
NXT Capital

**George Cotugno**  
Asset Tax & Insurance  
Lument

**Cameron Downey**  
Real Estate  
Investment Strategies  
Lument

**John Duffy**  
Underwriting  
NXT Capital

**Marie DuMond**  
Asset Tax & Insurance  
Lument

**Liz Fedkiw**  
Tax  
Boston Financial

**William Ferguson**  
Production Analytical  
Support  
Lument

**Nate Green**  
Underwriting  
NXT Capital

**Alexis Hadcock**  
Fund Management  
& Reporting  
Boston Financial

**Jane Hill**  
IT Business Analysis  
NXT Capital

**Hunter Holton**  
Production Analytical  
Support  
Lument

**Caroline Jackson**  
Underwriting  
NXT Capital

**Lauren Jourdian**  
Marketing  
& Communications  
Lument

**Veronica Kelly**  
Underwriting  
NXT Capital

**Scott Lackey**  
Asset Management  
Lument

**Spencer Lange**  
Underwriting  
Lument

**Danielle Mackenzie**  
Payroll  
ORIX USA

**Andrew McAllister**  
Accounting  
ORIX USA

**Lauren Meehan**  
Financial Planning  
& Analysis  
Boston Financial

**Conor Menning**  
Fund Accounting  
Lument

**Chris Norton**  
Production Analytical  
Support  
Boston Financial

**Juno Park**  
Structured Credit,  
Private Credit  
ORIX USA

**Matt Parrish**  
Fund Management  
& Reporting  
NXT Capital

**Matthew Ridgway**  
Asset Tax & Insurance  
Lument

**David Rodriguez**  
Internal Audit  
ORIX USA

**Ryan Sandles**  
Asset Management  
Lument

<b>Brendan Sheehy</b> Asset Management Lument	<b>James Thomas</b> Underwriting Lument	<b>David Tubb</b> Compliance ORIX USA	<b>Gerry Wallace</b> Production Analytical Support Lument
<b>Trina Watts</b> Asset Tax & Insurance Lument	<b>Albert Wilkinson</b> Investor Reporting Lument	<b>Crystal Willig</b> Loan Servicing Lument	<b>Kayle Zieber</b> Asset Management Lument

<b>Associate and Support</b>			
<b>Kellen Chen</b> Tax Boston Financial	<b>Jack Dugan</b> Underwriting Lument	<b>Tripp Frederici</b> Asset Management Lument	<b>Carter Griesedieck</b> Production Analytical Support Lument
<b>Wennie Guan</b> Accounting Boston Financial	<b>Heather Harsh</b> Asset Management Lument	<b>Oliver Herndon</b> Production Analytical Support Lument	<b>Justin Ho</b> Corporate Development Lument
<b>Daniel Hopkins</b> Real Estate Investment Strategies Lument	<b>Shiraz Jafri</b> Production Analytical Support Lument	<b>Meredith Konicki</b> Asset Management Lument	<b>Tucker Mallory</b> Loan Servicing Lument
<b>Justin Manders</b> Asset Management Lument	<b>Dimitri Mavrakis</b> Production Analytical Support Lument	<b>Chris McNally</b> Fund Management & Reporting Boston Financial	<b>Richard O'Neill</b> Loan Servicing Lument
<b>Ian Osterman</b> Production Analytical Support Lument	<b>Sneh Patel</b> Growth Capital, Private Credit ORIX USA	<b>Jose Ranz</b> Signal Peak Capital Management, Private Credit ORIX USA	<b>Melissa Rosario</b> Production Analytical Support Lument
<b>Kira Rosney</b> Underwriting Lument	<b>Kate Scheurer</b> Production Analytical Support Lument	<b>Nick Scott</b> Loan Servicing Lument	<b>Ankur Shiwakoti</b> Growth Capital, Private Credit ORIX USA
<b>Tinica Ward</b> Administrative Services <i>Office Services</i> <i>Administrator</i> ORIX USA			

We also recognize and congratulate the following employees who received promotions during Fiscal Year 2023:

<b>Senior Managing Director</b>

<b>Managing Director</b>

**Jeffrey Abrams**  
Private Credit  
ORIX USA

**Brian Meilton**  
FHA Lending Operations  
Lument

**Ian Monk**  
Multifamily Production  
Operations  
Lument

### Senior Director

**Kristi Dowdle**  
Loan Servicing  
Lument

**Simerdip Khangura**  
Legal  
ORIX USA

### Director

**James Clanton**  
Accounting  
ORIX USA

**Nicholas Diamond**  
Deal Originations  
Lument

**Michael Frigo**  
Sales & Trading  
Lument

**John Sigona**  
Real Estate  
Investment Strategies  
Lument

### Associate Director

**Michelle Brashear**  
Human Resources  
ORIX USA

**Mordy Chern**  
Production - SBL  
Lument

**Rodd Corner**  
Legal  
ORIX USA

**Michael Deming**  
Strategic Operations  
ORIX USA

**Alexa Laverick**  
Asset Management  
Lument

**Dennis McGregor**  
Human Resources  
ORIX USA

**Jane Menkes**  
Human Resources  
ORIX USA

**Patrick Roan**  
Production Analytical  
Support  
Lument

### Senior Associate

**Matt Barkis**  
Accounting  
ORIX USA

**Jay Hoyt**  
Asset Management  
Lument

**Luke Leyden**  
Production Analytical  
Support  
Lument

**Sean Moore**  
Fund Management  
Boston Financial

**Jacob Murphy**  
Loan Servicing  
Lument

**Nathaniel Nakon**  
Real Estate  
Investment Strategies  
Lument

**Brandon Tonne**  
Accounting  
ORIX USA

**Daniel Trejo**  
Real Estate  
Investment Strategies  
Lument

### Associate

**Chanel Fowler**  
Asset Management  
Lument

**Steven Manirath**  
Loan Servicing –  
Client Services  
Lument

**Chris Marino**  
Asset Management  
Boston Financial

**Davis McDaniel**  
Investment Sales  
Lument

**Sabrina Shields**  
Asset Management  
Lument

**Tyler Woodfield**  
Internal Audit  
ORIX USA

**Analyst**

**Senior Support**

**Drew Scott**  
Loan Servicing  
Lument

**Sharon Taylor**  
Asset Management  
Lument

**Tiffany Cook**  
Human Resources  
ORIX USA

**Monica Sharma**  
ORIX Capital Partners,  
Private Equity  
ORIX USA