



FLORIDA ATLANTIC UNIVERSITY

Board of Trustees

Item: GC: A-2

GOVERNANCE COMMITTEE

Date: Tuesday, June 10, 2025

SUBJECT: APPROVAL OF ELECTION OF NEW FOUNDATION BOARD MEMBERS.

PROPOSED BOARD ACTION

Approve the election of the following new board members to the Florida Atlantic University Foundation Board of Directors: Zach Berg '97, '00, Ettore Ventrice (*Limited Purpose*), Michael Yoon '96, and Thomas Zeichman '09.

BACKGROUND INFORMATION

Purpose of Action:

Per Florida Statute 1004.28(3), except for the directors appointed by the Chair of the University's Board of Trustees or designated by the University President, the University Board of Trustees approves all appointments of directors to the boards of directors of the University's direct-support organizations, including the Foundation. These proposed new Foundation Board members were unanimously elected for appointment by the Foundation's Board of Directors at its May 14, 2025, meeting.

Zachary "Zach" Berg '97, '00 serves as partner and managing director of wealth management for G2G Wealth Management at Steward Partners since November 2024. Previously, he served as managing director for J.P. Morgan (2023-2024); managing director for First Republic Investment Management (2015-2023); and relationship manager for Credit Suisse (2009-2015). In addition to financial advising, Mr. Berg has also worked in real estate and established his company Berg Realty Group (2002-2011) following the start of his career as a commercial leasing agent for Merin Hunter Codman, Inc. (1997-2000). Mr. Berg has served on the board of directors for Leadership Palm Beach County (2019-2022) and Take Stock in Children (2018-2022) as well as the FAU Foundation Board (2015-2023). While serving on the FAU Foundation Board, Mr. Berg served on several committees including Audit, Executive, Investment (2016 and 2019 chair), Philanthropy, and Real Estate (2018 chair). Mr. Berg resides in Palm Beach Gardens, Florida. He has two adult children.

Ettore "Eddie" Ventrice is a Managing Director of Wealth Management for the BV Group at UBS Financial Services in Boca Raton. Prior to this, he was a managing director of investments for Oppenheimer

& Company, Inc. He has over two decades' experience as a financial advisor. Ventrice earned his B.S. in Accounting from the University of Florida. He is a licensed insurance agent through UBS. Ventrice served on the FAU Foundation Board of Directors from 2019-2025, and chaired the Board's Investment Committee from 2023-2025. Ventrice has served two consecutive three-year terms as a Director on the FAU Foundation Board.

Michael Yoon '96 serves as senior vice president and investment director of institutional asset management for PNC Bank and has been with PNC since 2013. Prior to PNC, he served as vice president and senior portfolio officer for Bank of New York Mellon in Pittsburgh, Pennsylvania. From 1996 to 2006, he served as investment management analyst and second vice president for Citigroup Smith Barney in the Dallas/Fort Worth area. Yoon served as a Limited Purpose member of the FAU Foundation Board's Investment Committee from 2022-2025.

Thomas "Tommy" Zeichman '09 is a partner for the law firm, Beighley, Myrick, Udell, Lynne, Zeichman, P.A. Prior to this, he served as an attorney for the law firm Marshall Grant, PLLC. He began his career serving as an attorney for Messana, P.A. Mr. Zeichman earned a bachelor's degree in liberal arts and sciences from Florida Atlantic at the Harriet L. Wilkes Honors College on the Jupiter campus in 2009. He then earned a juris doctor from Nova Southeastern University in 2012 and was admitted to The Florida Bar in the same year. Mr. Zeichman specializes in business law in the areas of bankruptcy and commercial litigation. He currently serves on the FAU Alumni Association Board and served on the FAU Foundation Board from 2021-2023 as an ex-officio member.

IMPLEMENTATION PLAN/DATE

July 1, 2025.

FISCAL IMPLICATIONS

N/A.

Presented by:

David Kian, Interim CEO of the Florida Atlantic University Foundation

Phone: 561-297-3007



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Zachary M. “Zach” Berg ’97, ’00

<u>Current Position</u> Partner, Managing Director, and Wealth Manager	<u>Education</u> • MBA, Florida Atlantic University, 2000 • B.A., Political Science, Florida Atlantic University, 1997
<u>Business Name & Address</u> G2G Wealth Management at Steward Partners 3801 PGA Blvd., Ste 600 Palm Beach Gardens, FL 33410 (561) 570-5623	<u>Florida Atlantic Activity</u> • FAU Horizon Society, 2023 • Member, Board of Directors, FAU Foundation Board, 2015 to 2023 <u>Date of Birth</u> 10/1973

Briefing

Zachary M. “Zach” Berg serves as partner and managing director of wealth management for G2G Wealth Management at Steward Partners since November 2024. Previously, he served as managing director for J.P. Morgan (2023-2024); managing director for First Republic Investment Management (2015-2023); and relationship manager for Credit Suisse (2009-2015). In addition to financial advising, Mr. Berg has also worked in real estate and established his company Berg Realty Group (2002-2011) following the start of his career as a commercial leasing agent for Merin Hunter Codman, Inc. (1997-2000). Mr. Berg has served on the board of directors for Leadership Palm Beach County (2019-2022) and Take Stock in Children (2018-2022) as well as the FAU Foundation Board (2015-2023).

While serving on the FAU Foundation Board, Mr. Berg served on several committees including Audit, Executive, Investment (2016 and 2019 chair), Philanthropy, and Real Estate (2018 chair).

Mr. Berg resides in Palm Beach Gardens, Florida. He has two adult children.

Professional, Corporate, and Community Activities

- Partner, Steward Partners (G2G Wealth Management), 2024 to present
- Former Managing Director, J.P. Morgan, 2023 to 2024
- Former Managing Director, First Republic Investment Management, Inc., 2015 to 2023
- Former Relationship Manager, Credit Suisse, 2009 to 2015
- Former Owner/Manager, Berg Realty Group, 2002 to 2011
- Former Commercial Leasing Agent, Merin Hunter Codman, Inc., 1997 to 2000
- Former Member, Board of Directors, Leadership Palm Beach County, Inc., 2019 to 2022
- Former Member, Board of Directors, Take Stock in Children, a/k/a College for Kids, Inc., 2018 to 2022
- Forbes Best-In-State Wealth Advisor, 2023



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Philanthropy

- Raymond F. Kravis Center for the Performing Arts, Inc.
- Jewish Federation of South Palm Beach County, Inc.
- Arthur R. Meyer Jewish Academy, Inc.
- Meals on Wheels of the Palm Beaches
- Hospice of the Treasure Coast, Inc.
- Leadership Palm Beach County, Inc.

Comments

Berg has served previously as a Director on the FAU Foundation Board from 2015-2023.



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Ettore D. “Eddie” Ventrice

<u>Current Position</u> Management Director, Wealth Management	<u>Education</u> B.S., Accounting, University of Florida
<u>Business Name & Address</u> UBS Financial Services, Inc. 1800 North Military Trail, Suite 300 Boca Raton, Florida 33431-6377 561-416-6906	<u>Date of Birth</u> 02/1962

Briefing

Eddie Ventrice is a Managing Director of Wealth Management for the BV Group at UBS Financial Services in Boca Raton. Prior to this, he was a managing director of investments for Oppenheimer & Company, Inc. He has over two decades’ experience as a financial advisor. Ventrice earned his B.S. in Accounting from the University of Florida. He is a licensed insurance agent through UBS.

FAU Affiliations

- Ventrice served on the FAU Foundation Board of Directors from 2019-2025, and chaired the Board's Investment Committee from 2023-2025.
- UBS has given \$29,300 to FAU for Athletics and the College of Business.

Comments

Ventrice has served two consecutive three-year terms as a Director on the FAU Foundation Board.



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Michael H. Yoon '96

<u>Current Position</u> Senior Vice President and Investment Director	<u>Education</u> B.B.A., Finance, Florida Atlantic University, 1996
<u>Business Name & Address</u> PNC Bank 225 5 th Ave., Ste. 100 Pittsburgh, PA 15222-2730	<u>Florida Atlantic Activity</u> Limited Purpose Board Member, FAU Foundation Board, 2022 to present <u>Date of Birth</u> 05/1971

Briefing

Michael Yoon serves as senior vice president and investment director of institutional asset management for PNC Bank and has been with PNC since 2013. Prior to PNC, he served as vice president and senior portfolio officer for Bank of New York Mellon in Pittsburgh, Pennsylvania. From 1996 to 2006, he served as investment management analyst and second vice president for Citigroup Smith Barney in the Dallas/Fort Worth area.

Professional, Corporate, and Community Activities

- Senior Vice President and Investment Director, PNC Bank, 2013 to present
- Board Member-Limited Purpose, FAU Foundation Board, 2022 to present
- Member, Board of Directors, KidsVoice Pennsylvania, -- to present
- Treasurer and Member, Board of Directors, KidsVoice, -- to present
- Former Vice President and Senior Portfolio Officer, Bank of New York Mellon, 2006 to 2012
- Former Investment Management Analyst and Second Vice President, Citigroup-Smith Barney, 1996 to 2006

Philanthropy

- KidsVoice
- Chester County Hospital Foundation
- Montour Trail Council

Comments

Yoon served as a Limited Purpose member of the FAU Foundation Board's Investment Committee from 2022-2025.



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Thomas G. “Tommy” Zeichman ’09

<u>Current Position</u> Partner	<u>Education</u> • J.D., Nova Southeastern University, 2012 • B.A., Liberal Arts and Sciences, Florida Atlantic University, Harriet L. Wilkes Honors College, 2009
<u>Business Name & Address</u> Beighley, Myrick, Udell, Lynne, Zeichman, P.A 2385 NW Executive Center Dr Ste 300 Boca Raton, FL 33431-8530	<u>Florida Atlantic Activity</u> • Florida Atlantic Alumni Association Board, 2013-present • Florida Atlantic University Foundation Board ex-officio member, 2021-2023 • Florida Atlantic Alumni Chapters, Wilkes College Alumni Network, 2019-2021 • Florida Atlantic Alumni Chapters, Young Alumni Network, 2017-2021 • Honors College Advisory Council, 2013-2020
<u>Date of Birth</u> 09/1986	

Briefing

Thomas G. Zeichman '09 is a partner for the law firm, Beighley, Myrick, Udell, Lynne, Zeichman, P.A. Prior to this, he served as an attorney for the law firm Marshall Grant, PLLC. He began his career serving as an attorney for Messana, P.A. Mr. Zeichman earned a bachelor's degree in liberal arts and sciences from Florida Atlantic at the Harriet L. Wilkes Honors College on the Jupiter campus in 2009. He then earned a juris doctor from Nova Southeastern University in 2012 and was admitted to The Florida Bar in the same year. Mr. Zeichman specializes in business law in the areas of bankruptcy and commercial litigation.

Professional, Corporate, and Community Activities (not complete)

- Partner, Beighley, Myrick, Udell, Lynne, Zeichman, P.A., 2020 to present
- Member, Florida Atlantic Alumni Association Board, 2013 to present
 - Member, Executive Committee
- Attorney, Marshall Grant, PLLC, 2017 to 2020
- Attorney, Messana, P.A., 2012 to 2017
- Former Member, Planning and Zoning Board, City of Boca Raton

Philanthropy

- Nova Southeastern University, Inc.

Comments

Zeichman has served previously as an ex-officio member on the FAU Foundation Board from 2021-2023 while he was Chair of the Alumni Association Board.