

Executive *Influence*

Profiles of Central Ohio business leaders



A supplement to *The Daily Reporter*

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A supplement to
The Daily Reporter

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Columbus Academy's head of school carries on family tradition

Melissa Soderberg, head of school at Columbus Academy, uses her love for education to take on the role carried by both her father and grandfather.

Soderberg has, in fact, spent most of her life working in private education. She worked at St. George's boarding school in Rhode Island where she was a college counselor, teacher and coach. Later, she worked at Breck School in Minneapolis where she was the dean of students and director of college counselors, upper head for 20 years.

The head of school is a role that has become a tradition in the Soderberg family.

"My father was a headmaster of a school very similar to Columbus Academy. He was headmaster for 32 years and I have a grandfather who was the head for 33 years," she said. "So it runs in my family and it's just something that really appeals to me."

Along with other heads of schools with whom she has worked, Soderberg said her father and grandfather have played an important role in teaching her about education.

Soderberg received degrees from Middlebury College in Vermont and the Teachers College at Columbia University, where she was a Joseph Klingenstein Fellow.

When Soderberg accepted the role at Columbus Academy two-and-a-half years ago she became the eighth head of school and the first woman to hold the title.

She says the entire school community has been supportive of her.

"I got the sense that with the community of faculty and parents that it (being a woman) wasn't necessarily going to be a factor. And I've seen that to be true," she said. "The faculty and the parents and the board have been very supportive."

Taking on the large amount of responsibility that the position brings has been a very humbling experience for Soderberg.

"I think running any organization is an incredibly humbling experience and so what that means to me is that I have a tremendous amount of responsibility. This is a beautiful place. It's an over-230-acre campus. It has a lot of history – it's over 100 years old, being a really well established institution in the city. And, you know, my job is to be a good steward of those things. Its history, its future and its kind of landscape," she said. "So you know it's pretty humbling, right?"

Columbus Academy is an independent college-preparatory for students pre-k through 12th grade with more than 1,000 students.

As the head of school, Soderberg has a long list of tasks that she takes on each day.

"Faculty, alumni, parents, fundraising, admissions, budget, building and grounds – my daily life has all of that in it."

Soderberg said her career path was not pre-determined.

"I think it took me a while to decide that what I wanted to do was lead a school opposed to just working in one and just some of the natural things that happen to you in a career made me start to realize that I wanted to have more of an impact in the shaping of a school. But I do kind of miss the daily interactions that you do get in the classroom."

Teaching was part of her position as the upper school head in Minneapolis and it's something she would like to return to, but she knows it requires a lot of time and she has to figure out if it's something that makes sense for her.

"I really would like to. So I'm trying to figure out whether or not I could do it. But also teaching is not something you can do casually. It requires a lot of preparation," she said. "So I need to kind of feel like I understand enough of how my time needs to get allotted and I don't know yet. I mean, it's my third year, so

I'm just working to figure it all out. But it's definitely something I've considered doing."

Soderberg loves getting to know the students and really enjoys going to school events.

"I love to go to athletic games and art performances," she said. "So I do spend a lot of time getting to know students through those types of things that they do."

One of the things that Soderberg said is wonderful about her position is getting to have her own children with her and see them throughout the day.

Soderberg's two sons are enrolled at Columbus Academy, one is in eighth grade and one is a sophomore.

"I drive them to school every day. We eat the same lunch and we talk about the food or we talk about whether that basketball game was played well," she said. "So we share the experience and it's fantastic."

Soderberg laughed when she talked about how unbalanced the rest of her personal life is.

"I don't know how much of a balance it is," she said, "but that's OK." ■

~ Daily Reporter Staff



Melissa Soderberg
Head of School
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 **Columbus Academy**

Complacency not an option for CEO with long family history operating local bank

For the greater part of Chad Hoffman's life, a family member has been president at the local bank.

First, his maternal grandfather, then an uncle and then Hoffman's mother before him took turns at the helm of the nearly 140-year-old Richwood Banking Co. in northern Union County.

Pair Hoffman's pedigree with an early interest in finance and accounting and it's no wonder he now occupies the executive office.

The president and CEO of the closely held bank, however, is anything but complacent.

"I'm a capitalist at heart," he said. "Nobody is guaranteed their business model for life."

With additional banking locations in Delaware, Plain City, Marysville, Huntsville in Logan County and LaRue in Marion County, the bank serves the financial needs of a broad swath of northwest central Ohio.

In addition to the more traditional banking and financing products, services include online banking at www.richwood-bank.com, Pop Money – a secure, online method of sending and receiving money – and a Buzz Points Rewards Program, which encourages bank customers to patronize local merchants.

According to the bank's website "... what was true on the first day we opened our doors for business remains true today: A bank has to be more than just checking and saving accounts. It must offer its customers reputable service and support, time-saving conveniences, and the benefit of its financial knowledge and experience."

Hoffman's capitalist sentiment also

explains Richwood Bank's recent moves into marketing, payroll services, insurance and, yes, even food service.

Richwood Coffee, a retail coffee-house set smack-dab in the bank lobby of the Richwood banking office, resulted from a proposed lobby renovation and finding a vendor who could provide the bank with its own brew.

The menu features caffeinated drinks the likes of the Cafe Americano, latte and cappuccino dressed up to the drinker's particular taste, in addition to iced coffee drinks and fruit smoothies. Three part-timers man the shop.

Hoffman said the grand lobby hadn't been renovated since the late 1950s and it was a large, mostly open space.

"We also wanted to feel like a part of the community," Hoffman said.

The coffee shop opens early enough to catch the students on their way to North Union High School and commuters en route to work.

"It's a lively place," he said. "There's no rule that says banking can't be as fun as Disneyland."

Hoffman counts his mother Nancy, who now serves on the bank's board of directors, among his professional influences.

"She has been a mentor, certainly from the accounting side of the business," he said.

He described himself as a "quick study" of the business practices and philosophies of dynamic greats such as Disney, Apple and Starbucks.

Hoffman is willing to share what he has learned and allow Richwood to become a model for other community banks, trying to reinforce their own brands.

"We average about two banks a month, coming here to check us out," Hoffman said.

The takeaway from meetings with other community bankers is just as instructional for Hoffman.

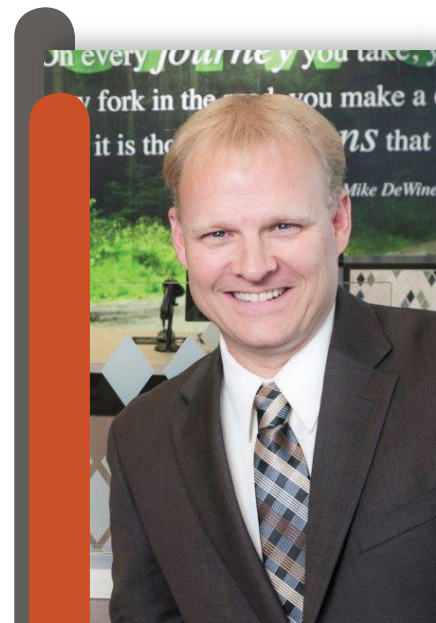
Most typically, he said, they want to hold on to lessons they have learned and not deviate from an outmoded community-banking philosophy.

"And if you wait to fix it until its broken, it's probably too late," he said.

Outside of the advice that helped Hoffman develop character as a young man, the best advice he recalls ever receiving is: "You have to be open to change."

An alumnus of both North Union High School and Ohio Northern University, where he earned a bachelor's degree in Business Administration in Accounting and Finance, Hoffman previously worked at the accounting firm of Holbrook & Manter before joining Richwood Bank as Chief Financial Officer in 1994. ■

~ Keith Arnold



Chad Hoffman
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Legal background integral to financial adviser's success

It was Courtney Sparks White's love of learning and numbers that drew her to the financial sector.

Last year, she became a partner at financial services firm Clarus Partners but, as she put it, the journey has been "a crazy ride."

A Lancaster native, White studied mathematics and financial economics at Vanderbilt University in Tennessee.

Upon her return to Columbus after graduation, she jumped straight into business valuation work at Columbus accounting firm GBQ Partners and then at a boutique firm.

"During that time I decided, 'Hey, why don't I go to law school?'" White said.

In 2005, she enrolled in Capital University's evening program while still working. She earned her J.D. in 2009.

"During that time, I got married and I told my husband, 'Well, I'm just going to go one more year,'" White said. "So I went one more year and I got my LL.M. in tax from Capital."

Upon graduating in 2010, White made the move to Clarus Partners where she launched – and still leads – the business valuation and forensic accounting team.

"It's funny, sometimes you just fall into stuff. I knew I loved numbers and I knew I wanted to do something in the finance field," she said. "It's so fascinating because I really get to blend the mix of math and logic with the analysis components I learned in law school and I love to learn."

According to White, the most rewarding part of her work is helping people with complex financial problems.

"I like to help people and bring clarity to financial aspects, whether it's valuation or something in a litigation setting, and when they finally get it, I love that, when they can take the information that I am giving them and make a better decision."

But White's corner of the accounting world doesn't necessarily come with a road map, which she considers one the biggest challenges of her career.

"There isn't a template a lot of times for the things I do and I think that's hard in the accounting world because, typically, you think of tax and audit, and there are a lot of things in those worlds that are very structured," she said. "Valuation definitely has a framework but every business and every situation is unique. That's challenging but also fun for me."

And though White says that a legal degree isn't necessary for her work, she admits, "It tremendously helps me."

Among the other helping hands in White's career are her parents, whom she considers mentors.

"I know that sounds kind of cheesy," she said, "but they are both very entrepreneurial."

White gained her business chops watching her parents run franchise restaurant operations, a business that she saw them develop from the ground up. And with a mother who is a financial planner, it's no wonder that White gravitated toward numbers from a young age.

"She's always been very encouraging of my sister and me in understanding numbers," White said. "When we were little, she talked about the time-value of money so it's funny that's something I now do everyday."

Despite being an expert in her field, White says she makes a point to learn something every day, even if it's unintentional. The most important piece of advice she can give to those entering the financial field: "Constantly be learning."

"There are so many different aspects to what I do. I get to touch so many different types of businesses, so get experience, don't be afraid to roll you sleeves up and understand it."

She also believes that perspective is key to success in her field, where the big picture may not always be everything it seems.

"You have to be able to talk to people at a 10,000-foot view and you also have to be able to go down into the weeds, so it's impor-

tant to have both those perspectives, looking closely and then pulling back and being able to answer the question you're really trying to answer."

For now, White is focused on growing her practice at Clarus, creating "an organization that is unique in the accounting space in terms of the mindset and the attitude of the individuals that we have here."

"We're very entrepreneurial. We want to be able to help that small business owner and grow with them," White said, noting that she may sound cheesy once again. "I love what I do and since the day I got to Clarus it hasn't felt like work to me because I've just been able to get out and do the stuff I love to do and help people. I think when you're doing that, when you have that vision, then it's not work."

In addition to her professional achievements, White makes it a point to ensure that she spends time giving back to the community as an example for her family.

"As a young mom, it's important for me to show them how to give back," White said. "I want to build a practice that helps and serves."

White lives in Gahanna with her husband, Gaston, their two sons, Bob and Henry, ages 3 and 5, and their dog, Chipper. ■

~ Annie Yamson



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Twins team up to lead finance firm

As twin brothers and best friends, Matt and Mark Palmer spent years discussing ways to bring their career paths together.

In 1999, the pair's talks came to life with the formation of The Joseph Group, a capital management firm.

The company, which provides wealth and financial planning, group retirement plan consultation and discretionary investment management, was established off the strength of Matt's background in finance and Mark's legal career.

"The approach that an attorney takes to representing a client is very analogous to helping a client with a financial plan – understanding goals, identifying obstacles and finding solutions," said Mark, who previously was a partner with Bricker & Eckler.

"We knew that by building a firm that helped plan and manage our clients' financial resources, they could spend their time living great lives and accomplishing their life mission and goals. For us, we could see no greater joy than going to work each day with the goal of helping our clients this way."

Along with being client advisors, Mark is the CEO of The Joseph Group and Matt serves as president.

Matt, who has degrees from Ohio Wesleyan University and Harvard University, is a former vice president of the Huntington Trust Company and past principal of Professional Planning Consultants Inc.

Throughout his time in the financial arena, Matt said, the evolution of technology has had the biggest impact on the industry – in ways that can both benefit and distract clients.

Technology allows "investors to monitor markets in real time, which increases their focus on short-term investment results at the expense of longer term results, which is where their real focus should be," he said. "This requires that we communicate regularly with clients to remind them where their focus needs to be."

In referencing the industry's volatility, Matt said that given the market's current

environment, generating reasonable returns for clients at reasonable levels of risk is the investment field's greatest challenge.

"We work hard at communicating with clients so they understand that pursuing higher returns means taking on greater portfolio risk," he said.

A range of clients have tapped the firm to manage IRA rollovers, personal and corporate brokerage accounts, charitable accounts and trusts on a discretionary basis. Accounts range from less than \$100,000 to several million dollars.

While the Palmer brothers and their team take pride in fostering good professional relationships, Matt and Mark's personal bond hasn't gotten lost in the shuffle.

"We like to say that we were womb mates, then we became roommates and someday we'll be tomb mates," Mark joked.

"It's a pretty natural flow. We bring different strengths to the firm and are able to focus those in ways that benefit our clients and our team. We also enjoy being together, which really helps given that our offices are right next to each other."

The brothers' sibling connection isn't the only familial tie with The Joseph Group. The venture is named after their father.

Joseph Palmer made his career in the adult and juvenile corrections industry and served as chair of the Ohio Parole Board and deputy director of the Ohio Department of Rehabilitation and Correction.

Matt said he and Mark have built their investment firm around three core values their father represented: integrity, excellence and enthusiasm.

"As men of faith, we also were inspired by the virtuous life of Joseph in the Bible," he said.

Mark said the duo's greatest asset as leaders is their commitment to building a culture of family where their team can find meaning in their work by caring for one another and the company's clients.

"Finding meaning in day-to-day work routines is necessary in maintaining a workplace where our team looks forward to coming to work," he said.

For anyone wanting to enter the capital management field, Matt offered some advice. "Technical skills are very important. But so are relationship building skills: genuine empathy; the ability to ask great questions; and a true passion for the interests and lives of others," he said. ■

~ Tiffany L. Parks



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Capital educator's rise to leadership in line with law school's mission

Had Rachel Janutis not attended her alma mater, the University of Illinois College of Law, she would have been just the sort of student Capital University would have sought for enrollment – the first of her family to attend college, pursue a post-graduate degree and go on to seek a professional license.

Once a law professor at Capital and now the interim dean of its law school, Janutis said the circumstance aided her in identifying the value of some of the opportunities she encountered while checking off each of those firsts from her list of accomplishments.

She never dreamed when she left private practice – content, yet seeking her next, great endeavor – that she would wind up heading a law school.

"I wanted to do something that resonated in me and to me that was law education," she said.

Upon leaving the Chicago firm of Winston & Strawn, where her practice focused on antitrust, contracts, business torts, and products liability, she served as a visiting assistant professor at her alma mater.

She joined Capital in 2002 and has taught courses on civil procedure, remedies, complex litigation and conflict of laws. The casebook she co-authored has been adopted by numerous law schools across the country.

She was named director of faculty development in the fall of 2007 and subsequently served as associate dean of academic affairs from July 2010 to June 2014.

"Serving as dean is a way to continue what I was doing before," Janutis said, noting the distinction. "I miss it, the everyday interaction, witnessing the 'aha!' moments."

She now takes joy in other firsts that she wouldn't necessarily have had a part in as professor of law, such as addressing

the graduating class last spring or receiving a personal invitation from Ohio Supreme Court Chief Justice Maureen O'Connor to address a group of new lawyers who successfully completed the bar exam.

Janutis has adopted the four priorities of the college and considers them every opportunity she gets.

"I embrace them because they make sense," she said.

The priorities are the curriculum, post-graduate success, community impact and alumni engagement.

Janutis said faculty and advisory boards are always reviewing the curriculum to make sure it has the necessary components of being practical, ethical and intellectual and that the students are getting what they need from it.

The college has long boasted a strong bar-passage rate and labors to maintain it.

"We're constantly looking at data," she said. "We want to be sure that what we're doing continues to make sense."

The employment component of the post-graduate success priority is one that is very important to Janutis.

"It's a big one for me," she said. The college monitors hiring trends and legal trends, in general. "It's important for the college to help our students find jobs."

The college takes seriously its role in each of the communities of which it's a part – Capital University, the legal community and Columbus as a whole.

Janutis said the college is fortunate to have such a rich pool of talented alumni and strives to keep its individual members engaged in the law school and young lawyers it produces.

Some of the best advice she ever received is to always keep a clear focus.

"If I can't figure out how to advance a priority then it's probably not something I should be doing," she said.

She also recognizes the importance of communication, especially when viewing the law school from a macro level at 10,000 feet.

"I'm in a unique position to see all of the activity at the law school," she said, indicating that from department to department, faculty leaders will not have the same grand overview her position allows. The importance of communicating the message for the greater good of the college cannot be overstated.

And the last "best advice" she shared is "don't personalize things."

"Someone said it to me: 'It's the chair and not the person sitting in the chair,'" Janutis clarified.

Janutis loves the Midwestern feel that Columbus exudes. She said it's more approachable than Chicago and boasts a family-friendly atmosphere with something exciting to do at every turn.

She and her husband are raising their family in Bexley, where she's thankful for the good schools and easy commute to work each day. ■

~ Keith Arnold



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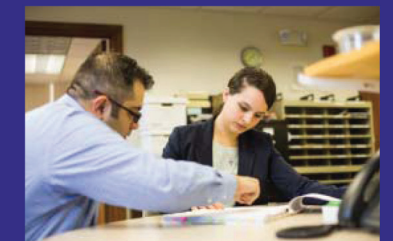
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