



Steven J. Menna

Alternative Investments Lead Partner - Dallas

KPMG LLP
Suite 3100
717 North Harwood Street
Dallas, TX 75201-6585

Tel 214-840-2884
Cell 214-766-3214
smenna@kpmg.com

Function and specialization

Steven is a partner in KPMG's Dallas office. He specializes in audit services for clients in the alternative investments industry including Hedge, Private Equity and Venture Capital Funds.

Representative clients

- Perot Investments
- Ranger Capital
- Swank Capital
- Dimension Capital
- Pointer Management
- Tolleson Wealth Management
- Velite Capital
- Meritage Capital

Professional associations

- Chairman of the Texas Hedge Fund Association (THFA)
- Member, Mid-South Alternative Investment Association (MSAIA)
- Member, Southeastern Hedge Fund Association (SEHFA)
- Member, American Institute of Certified Public Accountants
- Member, Texas Society of Certified Public Accountants

Background

Steven Menna is a partner based in KPMG's Dallas office and serves as the leader of its Dallas Alternative Investments practice. He works with both Domestic and International clients within the hedge, private equity and venture sectors including fund of funds. He has extensive experience in various products including swaps, forwards, futures, securities lending, reverse repurchase agreements, debt and equity securities, private equity and venture capital investments. He specializes in providing alternative investment clients with advice on initial fund structure, supervision of annual compliance audit engagements, and ongoing consultation with management regarding various operational, regulatory and tax matters.

Professional and industry experience

Prior to joining KPMG, Steven was the managing partner of the Rothstein Kass' Dallas office. In addition to providing the services as his current role with KPMG, Steven handled the financial, recruiting, personnel aspects of the Dallas office while driving the market in the alternative investments space in the Southwest and the Southeast area of the country.

Prior to joining Rothstein Kass, Steven was a partner at Ernst and Young, leading their Southwest area's asset management practice. At E&Y, he was responsible for the coordination, management, administration and performance of auditing and business advisory services for a diverse asset management client base.

Steven is a graduate of State University of New York at New Paltz, where he earned Bachelor of Science degrees in accounting and business administration. He is a member of the American Institute of Certified Public Accountants (AICPA) and the Texas Society of Certified Public Accountants (TSCPA).

Other activities

- Chairman of the Texas Hedge Fund Association (THFA)
- Founder, Dallas Investment Fund Forum, an annual educational event that draws more than 300 alternative investment professionals.
- Frequent speaker at alternative investment events

- Member, New York State Society of Certified Public Accountants
- Member, Texas Wall Street Women

Education, licenses & certifications

- BS degree in accounting, State University of New York (SUNY) at New Paltz
- Licensed CPA—New York, New Jersey and Texas