

STRATEGIC ALLIANCE PARTNERS



Please contact our SAPs when you have a need for their services!



Adams Keegan
www.adamskeegan.com
Brian K. Evans
brian.evans@adamskeegan.com
(615) 809-8854

FORUM TOPICS

- Assessing cost and finding leaks in HR operations: How much should HR really cost?
- The laws of benefits: What you can and cannot do regarding employee benefits.
- All things PPP and Covid: Navigating your business and employees through this difficult time.



AllianceBernstein
www.alliancebernstein.com
Adam Sansiveri
Adam.Sansiveri@Bernstein.com
(615) 762-3551

FORUM TOPICS

- Printing Money: Understanding inflation and how it can impact you and your business.
- Pre-experience Selling Your Business: The power of seeing it before it happens
- Tax changes on the horizon and what it means for you
- From One CEO to Another: Discussion with AB CEO, Seth Bernstein



Baker Donelson
www.bakerdonelson.com
Chris Sloan
csloan@bakerdonelson.com
(615) 412-9870

FORUM TOPICS

- Top 3 issues employers should know about for operating during Covid-19.
- Make your workplace a hard target: Practical strategies to prevent and prepare for violence in the workplace
- Choose your own adventure: If another question or topic is of interest to your forum, we will customize a presentation just for you! Or we could bring a couple of folks for an "AMA" (Ask Me Anything) session.



Bradley
www.bradley.com

Doug Franck
DFRANCK@bradley.com
(615) 252-2354

Russ Morgan
rmorgan@bradley.com
(615) 252-2311

FORUM TOPICS

- Q & A from a legal perspective - engaging, compensating and transitioning employees.
- Due your diligence now and lessons to minimize surprise - milestone transactions & key company contracts.
- Our success depends on our IP - helpful hints to protect and monetize this, that and the other.



The CityLiving Group at Village
www.villagetn.com
Deborah Vahle
deborah.vahle@gmail.com
(615) 335-0770

FORUM TOPICS

- Buying and selling your home during covid
- Nashville real estate market update
- Ask Mark! Have real estate questions for Mark Deutschmann?



CLA (CliftonLarsonAllen)
www.claconnect.com
Mark Wyzgowski
Mark.Wyzgowski@claconnect.com
262-930-8313

FORUM TOPICS

- Questions you should be asking your CPA-What all taxpayers should know/Own the plan to execute
- How to become bankable- Numbers matter, but what else can help?
- How do you know when you are ready to sell your business? Financial/Emotional
- Trends in financing start-ups



Capita Works
www.capitaworks.com
Adrian J. Romero
ajromero@capitaworks.com
(858) 280-1748

FORUM TOPICS

- How to Scale up Your Business by Leveraging Global Talent For Any Role at a Fraction of the Cost.
- Myths and Facts About Hiring a Virtual Assistant.
- Return on Time (ROT): The Most Underrated KPI: Learn why ROT should be on every company's scorecard and get two practical solutions to increase it.



Continuum Planning Partners
www.continuumplanningpartners.com
Abby Spaulding
abby.spaulding@continuumpp.com
(615) 714-0911

Andy Fought
andy.fought@continuumpp.com
(615) 403-4989

FORUM TOPICS

- How to make your assets dynamic.
- Creditor and asset protection: Protect what you have worked so hard to build.
- Economic outlook: Prepare for changes in the local and national business environment.



Dev Digital
www.devdigital.com
Kimberly J. Smith
kimberly@devdigital.com
(615) 904-4785

FORUM TOPICS

- There is Blood in the Streets... NOW WHAT? Now is the best time to invest in your business.
- SEO is the CEO of your Website- A discussion on how Search Engines can drive more qualified leads straight to your website.
- "THERE SHOULD BE AN APP FOR THAT!": How to tell if investing in app development is the right way to spend your money.

STRATEGIC ALLIANCE PARTNERS



EOS Worldwide
www.eosworldwide.com/
justin-cook
Justin Cook
justin.cook@eosworldwide.com
(615) 336-7133

FORUM TOPICS

- Create Lasting Change - why change doesn't stick and what to do about it.
- Right People Right Seats - How to define it, how to measure it, and how to take action.
- Clarifying your Vision and Plan with 8 Questions so that everyone is rowing the boat in the same direction.
- Conflict is Good! - Learn to lay the foundation for healthy conflict in the workplace.



First Horizon Bank
www.firsthorizon.com
David Jones
wjones@firsthorizon.com
(629) 208-2019

FORUM TOPICS

- Economic update/forecast.
- Beyond PPP: What role the SBA can play in your business.
- A Roadmap to Investing in Real Estate.



Frazier Deeter
www.frazierdeeter.com
Danene Bottiaux
Danene.Bottiaux@frazierdeeter.com
(615) 416-6888

FORUM TOPICS

- Personal and business tax planning to maximize cash-flow
- Transaction advisory, support from the buy or sell side of a deal.
- SOC (statement of controls reports and internal control assessments to help you identify and remediate gaps in your company's business processes and procedures.



Martin & Zerfoss
www.martinzerfoss.com
Paul Steele
psteele@martinzerfoss.com
(615) 297-8500

FORUM TOPICS

- Cyber Liability: Do I need it? Am I at risk?
- Why are my rates going up?
- Testing Your Systems: IQRMs. IQRMs are tests we can administer created by industry experts in fields like cyber, fleet safety, business continuity, etc. A company can take a test to see what grade they get in a certain area.



NowCFO
www.nowcfo.com
Troy Tschantz
Troy.tschantz@nowcfo.com
(615)364-5109

FORUM TOPICS

- **Surviving a Broken Economy:** Whether it's allocating your available cash or guiding a financial model to help you make the big decisions, we'll share a solid checklist you need to start protecting your company.
- **Establishing a Business Report Card:** We'll talk through the most important financial measurements, creating processes to efficiently gather data, and 3-5 things to measure weekly.
- **How to Mitigate Risks/Fraud:** Important checks & balances, supervision of accounting staff, strengthening your financial reporting team and improving statement accuracy.



Pinnacle
www.pnfp.com
Kevin Roddey
Kevin.Roddey@PNFP.COM
(615) 800-9849

FORUM TOPICS

- Show me the money - how to get a loan from a bank.
- Beg, borrow or buy - financing options to acquire (or be acquired).
- How SBA can help your business.



ProTech Services Group
www.psgi.net
Amit Kanda
akanda@psgi.net
(901) 351-5350

FORUM TOPICS

- Managing remote workforces and better leveraging technology.
- Managing security at both the organizational level and insurance level.
- What a robust backup and DR plan should look like.



Tennessee Valley Group
www.tnvalleygroup.com
Jim Cumbee
jim@tnvalleygroup.com
(615) 390-9966

FORUM TOPICS

- How business valuations are determined and the four steps to understand how to sell for an irrational high valuation
- The seven principles of making your company irresistible once you decide to sell (and why it matters even if you aren't thinking about selling).
- Lessons learned from the secret failure of the Disney Institute that will help you achieve sustainable success in your business (and life.)

STRATEGIC ALLIANCE PARTNERS



Vaco
www.vaco.com
Jessika Poirier Hatchell
jpoirier@vaco.com
(615) 324-5087

FORUM TOPICS

- Embracing company culture in the new virtual world.
- Hiring, on-boarding, and retaining your team in a remote world.
- How to foster existing relationships in a virtual world.



Viking Mergers + Acquisitions
www.vikingmergers.com
Kyle Kerrigan
kyle@vikingmergers.com
(615) 988-9945

FORUM TOPICS

- Why it is critical to understand the value of your business from a buyer's perspective and how you can use that valuation to help you make great business decisions
- Everyone has an exit plan (whether they know it or not), and why having a good grasp on your exit plan can give you greater freedom to run your business effectively
- Why do so many great "looking" deals fall apart? The complex reason and simple reason.



WC Dillon Company & Insight Risk Management
www.wcdilloncompany.com
Chan Dillon
chan@wcdilloncompany.com
(615) 948-7118

FORUM TOPICS

- What to expect when your business is sued or has property damage - Current claims scenarios affecting our customers and what coverage gaps put businesses most at risk.
- Covid insurance updates - active and potential lawsuits against businesses and insurance companies, what is covered by insurance and what are exposures to my business.
- Why is health insurance so expensive? An insider's opinion.

IN-KIND STRATEGIC ALLIANCE PARTNERS



Dalton Agency
www.daltonagency.com
Jeff Bradford
jbradford@daltonagency.com
(615) 515-48884

FORUM TOPICS

- 10 ways to get the media's attention
- 8 tips for becoming a better writer
- Content Marketing 101
- SEO: How to show up on more web searches



Nashville Entrepreneur Center
www.ec.co
Jane Allen
jane.allen@ec.co.
(615) 473-1434

FORUM TOPICS

- Building a diverse and inclusive culture: Companies that focus on building diverse and inclusive teams have a significant competitive edge when it comes to financial performance, innovation and capturing new markets
- How does the EC drive impact and value throughout the entrepreneurial lifecycle.
- How is Nashville connecting the entrepreneurial, business and investment communities to drive entrepreneurial growth



orangethreadLIVE
www.orangethreadLIVE.com
Luke McElroy
luke@orangethreadlive.com
(615) 724-1502

FORUM TOPICS

- The Guide to a Great Virtual Event
- "How I added 14,000+ emails to our mailing list in 18 months"