

# STRATEGIC ALLIANCE PARTNERS



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



**Adams Keegan**  
www.adamskeegan.com  
**Brian K. Evans**  
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(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

- Pre-Experience Selling Your Business: What can life be like after a liquidity event and strategies to minimize the tax bite
- Economic Outlook: Hear from the world's largest independent financial research firm on what lies ahead
- Family Engagement: How to make sure your success doesn't ruin your kids
- Maximizing Pre-Tax Wealth through your Business: Strategies to save more and retire faster



**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.



**Capita Works**  
www.capitaworks.com  
**Erika Pichardo-Ley**  
epichardo@capitaworks.com  
(619) 991-9197

## 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.



**The CityLiving Group at Village**  
www.nashvillecityliving.com  
**Deborah Vahle**  
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(615) 335-0770

## FORUM TOPICS

- Nashville Market Update (residential)
- Ask Us! Have real estate questions? We're here to help.
- Real Estate Investment Strategies



**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



**Continuum Planning Partners**  
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**Abby Spaulding**  
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**Andy Faught**  
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(615) 403-4989

## FORUM TOPICS

- Creating an intentional net worth - change your net worth from a financial "junk drawer" to actively progressing towards your goals
- Shifts to take advantage of a high inflation environment
- Using trusts and corporate structures to protect your assets



**Culture Index**  
www.cultureindex.com  
**John Conger**  
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(913) 777-9164

## FORUM TOPICS

- Right People, Right Seats: Turning Talent into Performance
- Employee Engagement: Identifying, Managing, and Retaining "A" Players
- Making Executives Effective: Leveraging Your Unique You for ROI



**Dev Digital**  
www.devdigital.com  
**Stephen Davis**  
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(615) 417-5432

## 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.



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

## FORUM TOPICS

- Right People Right Seats - How to define it, how to measure it, and how to take action
- 8 Questions to Fully Align Your Organization
- EOS Ask Me Anything - Have you read Traction, tried implementing EOS, or want to know what the heck it is? Get all your questions answered by a pro



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

## FORUM TOPICS

- Fraud: What can I do to protect my business?
- SBA: How it can add value in growing your business
- Economic Update/Forecast



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

## FORUM TOPICS

- Cyber Liability: Do I need it? Am I at risk?
- Why are my rates going up?
- Open conversation about the risk and issues you and your company are going through



**NowCFO**  
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**Craig Cook**  
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(615)-308-5486  
**Eric Patrick**  
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(615)-878-1508

## FORUM TOPICS

- **Surviving a Broken Economy:** We'll provide a solid checklist and help you allocate cash and develop a model to make big decisions.
- **Establishing a Business Report Card:** We'll cover financial measurements, processes to gather the data and develop 3-5 weekly measurements.
- **How to Mitigate Risks/ Fraud:** Checks & balances, supervision of accounting staff, strengthening your financial reporting team and improving 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**  
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(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**  
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(615) 390-9966

## FORUM TOPICS

- How business valuations are determined and the four steps to understand how to sell for an irrationally high valuation.
- The seven principles of making your company irresistible whether you're selling or not
- Lessons painfully learned from the secret failure of the Disney Institute that will help you achieve sustainable success in your business (and life.)
- \*Nine Things I've Learned From My Nine Years as an EONashville SAP



**Trainual**  
trainual.com/consultant/  
elizabeth-yarbrough  
**Elizabeth Yarbrough**  
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## FORUM TOPICS

- Using Systems to Scale Your Business: 5 SOPs every business needs
- Why Good Onboarding and Training is Key to Scaling your Business
- The Process Documentation Roadmap: What and why to document & how to get started



**Vaco**  
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## FORUM TOPICS

- "The Employment Situation" (Stats/News/Relevant Info will be updated each Quarter)
  - Up to date quarterly hiring data
  - Hiring news & trends
  - What workers want



**Viking Mergers + Acquisitions**  
www.vikingmergers.com  
**Kyle Kerrigan**  
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(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**  
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**Chan Dillon**  
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(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.
- Why is health insurance so expensive? An insider's opinion.
- Employment Practices Liability Insurance and ADA website compliance - why do i need it? What else does EPL cover and what is the difference between first party and third party coverage?

# IN-KIND STRATEGIC ALLIANCE PARTNERS



**Dalton Agency**  
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## 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**  
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## 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

