

STRATEGIC ALLIANCE PARTNERS



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



Adams Keegan
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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
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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
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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
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Russ Morgan
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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
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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.
- Labor Market Update: Quiet Quitting is the next stage of The Great Resignation.



The CityLiving Group at Village
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FORUM TOPICS

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



CLA (CliftonLarsonAllen)
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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



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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
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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



EOS Worldwide
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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



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FORUM TOPICS

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



Insperity
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FORUM TOPICS

- Dealing with Difficult Employees: When to Coach & When to Let Go
- Developing Leaders: What is Important at Each Level
- Compensation Strategies for Specific Roles



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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



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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
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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.



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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.



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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
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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



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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
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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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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



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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



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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

