



**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.
- Human Resources Q&A: Best practices and traps to avoid for an entrepreneur



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

### FORUM TOPICS

- Pre-Transaction Planning: How much do I need to live my best life after I sell my company? Which deal structure gives me the best long-term outcome? What strategies and vehicles will help me retain the most after-tax proceeds? How can I maximize what I leave to children or charity?
- Economic Outlook: Hear from the world's largest independent financial research firm on what you need to know
- How Should I Be Invested: The Markets are not complacent, so you shouldn't be either
- Identifying Disruption: Where are the most compelling opportunities today?



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

### FORUM TOPICS

- AI and ChatGPT and how it impacts your business
- Everything you need to know about the Corporate Transparency Act and its impact on Private Companies
- 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.



**Blankenship CPA Group, PLLC**  
www.bcpas.com  
**Ben Smidt**  
bsmidt@bcpas.com  
(615) 425-2324

### FORUM TOPICS

- HOW TO NOT PAY (a lot) IN TAXES: Diversified income tax planning: Planning pyramids for both entities and individuals
- Once in a lifetime: maximize value when creating your succession/transition plan
- From Me to We: The economics of partnerships and profit allocation
- How to fall in love with your accountant: Real time accounting to enhance your performance



**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.



**Brentwood MD**  
www.brentwoodmd.com  
**Aaron Wenzel**  
awenzel@brentwoodmd.com  
(615) 975-4048

### FORUM TOPICS

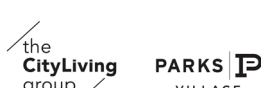
- Longevity: 90 is the new 60. Why adding 3 decades of vibrant living is possible for many
- "The Doctor is in": a 10 min overview of what concierge medicine is all about, then open Q & A
- Hot Trends: Get the doc's take on current trends in specific medical diagnostics and treatments



**CEO Coaching International**  
ceocoachinginternational.com  
**Heidi Smith**  
heidsmith@ceocoaching.com  
(949) 232-6647

### FORUM TOPICS

- CEO MISTAKES—CEOs don't have all the answers. Our coaches (former CEOs) will help you pinpoint the mistakes you are making with hiring, cash, KPIs, etc...and how to overcome them.
- CEO ACCOUNTABILITY—Our former CEOs will discuss measurement frameworks and accountability strategies you can use to create a sense of control and understanding in your business on a daily basis.
- CEO FINANCIAL MUST-HAVES—Learn how to get your financial house in order with our CEO Financial Must-Haves. You'll learn how to translate your vision into a strong balance sheet, run cash scenarios and evaluate your business like an investor.



**The City Living Group at Parks**  
www.nashvillecityliving.com  
**Deborah Vahle**  
deborah.vahle@gmail.com  
(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**  
www.continuumplanningpartners.com  
**Abby Spaulding**  
abby.spaulding@continuumpp.com  
(615) 714-0911  
**Andy Faught**  
andy.faught@continuumpp.com  
(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
- Using trusts and corporate structures to protect your assets
- Tax reduction strategies
- Managing high interest environments



**Culture Index**  
www.cultureindex.com  
**John Conger**  
jconger@cultureindex.com  
(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
- \*Survey required prior to forum visit



**EOS Worldwide**  
www.eosworldwide.com/  
**Justin Cook**  
justin.cook@eosworldwide.com  
(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



**Equitas Strategy Partners**  
www.equitassp.com  
**Craig Cook**  
craig@equitassp.com  
615-308-5486

### FORUM TOPICS

- Cash Flow Forecasting: Strategies for improving, budgeting techniques, and managing accounts
- Financial Statement Analysis: How to read and interpret, what they indicate and identifying trends
- Profitability Improvement: Pricing strategies, identifying profitable lines, reducing operational costs, and cost-benefit analysis



**First Horizon Bank**  
www.firsthorizon.com  
**David Jones**  
wjones@firsthorizon.com  
(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



**Insperity**  
www.insperity.com  
**Leah Glover Hayes**  
Leah.hayes@insperity.com  
(734) 740-4925  
**Mike Ocheltree**  
mike.ocheltree@insperity.com  
(615) 585-6903

### 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



**The Intention Collective**  
www.intentioncollective.co  
**Zach Montroy**  
zach@intentioncollective.co  
(615) 236-6305

### FORUM TOPICS

- 6 Mistakes that will break your small business
- How to hold your team accountable without being an asshole?
- The two most important attributes of exceptional leaders who grow & scale healthy companies (free assessment included)
- A one-page (killer) plan to scale your business



**Martin & Zerfoss**  
www.martinzerfoss.com  
**Jennifer Bourne**  
jbourne@martinzerfoss.com  
(615) 297-8500  
**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?
- Open conversation about the risk and issues you and your company are going through



**NowCFO**  
www.nowcfo.com  
**Shaun Johnson**  
shaun.johnson@nowcfo.com  
(804) 385-2220  
**Eric Patrick**  
epatrick@nowcfo.com  
(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.psg.net  
**Morgan Droke**  
mdroke@psgi.net  
(731) 438-7658

### 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.



**Second First**  
www.secondfirst.com  
**Megan Long**  
Megan@secondfirst.com  
(615) 639-1497

### FORUM TOPICS

- Elevate Your Partnership With Your Second-In-Command in 3 Steps
- COO Coaching & Peer Groups: Your Competitive Advantage
- Identifying Your Ideal Second-In-Command



**Skillway**  
www.skillway.com  
**Dew Tinnin**  
dew@skillway.com  
(612) 366-4822

### FORUM TOPICS

- Creating sales compensation plans and hiring salespeople
- Understanding and refining your sales process (The Cycle of the Sale)
- How to reverse engineer detailed sales goals
- Sales Q&A - Bring Your Unanswered Sales-Related Questions



**Tennessee Valley Group**  
www.tvvalleygroup.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 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**  
Trainual Certified Consultant  
(615) 478-2899  
elizabeth@untangleyourbiz.com

### FORUM TOPICS

- Getting Your Business Out of Your Brain
- Digitizing Your Company Playbook
- Distilling Your DNA



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

### 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**  
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
- 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



**McNeely Brockman PR**  
mcneelybrockmanpr.com  
**Kelly Brockman**  
kelly@mcneelybrockmanpr.com  
(615) 812-6513

### FORUM TOPICS

- Media relations and media training 101- How to get in the news AND how to stay out of the news
- Crisis Communications Management- What to do when something goes wrong
- Finding the story - Be a Storyteller- We all have stories about our businesses, how do you tell yours?
- Proactive Social Media Planning- What channels are you on and how are you scheduling and maintaining your social media channels?



**Nashville Entrepreneur Center**  
www.ec.co  
**Sam Davidson**  
sam.davidson@ec.co  
(615) 260-3082

### FORUM TOPICS

- Community Wins - How teams can do more together to win business, keep employees, and grow their audience
- The Case for Community - Why leaders need to invest in community and how they can measure its effectiveness
- Better Together: A history of entrepreneurship in Nashville and how it can become the most entrepreneurial city in America