

STRATEGIC ALLIANCE PARTNERS



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

EO + Catalyst Partners



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



Baker Donelson
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Chris Sloan
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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
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Ben Smidt
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FORUM TOPICS

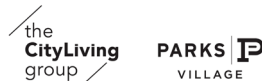
- HOW TO NOT PAY (a lot) IN TAXES: Diversified income tax planning: Planning pyramids for both entities and individuals
- Once in a lifetime: maximize value when creating your succession/transition plan
- From Me to We: The economics of partnerships and profit allocation
- How to fall in love with your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



Bradley
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Doug Franck
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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



The City Living Group at Parks
www.nashvillecityliving.com
Deborah Vahle
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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)
www.claconnect.com
Mark Wyzgowski
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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

EO + Catalyst Partners



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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
- Using trusts and corporate structures to protect your assets
- Tax reduction strategies
- Managing high interest environments



Dell for Startups
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 (512) 513-1652

FORUM TOPICS

- Tech Troubles (Open Forum) - Bring your own tech questions, frustrations, and issues for assistance
- AI for Beginners - A beginners guide to breaking down ‘what is AI’ and how it can work for you



EOS Worldwide
www.eosworldwide.com/
 justin-cook
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FORUM TOPICS

- Delegate and Elevate: Learn why it's so hard for you to delegate, and what you need to do to truly let go
- Accountability: How to lead and manage so that accountability is a byproduct, not something you have to do to people
- Feedback - The Only Way to Get Better: How to build a high trust culture of fearless feedback
- 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



e|spaces
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FORUM TOPICS

- The Future of Work: Designing Spaces that Inspire Innovation
- Redefining the Modern Workspace: Balancing Flexibility and Productivity
- Empowering Small Teams and Startups: Maximizing Resources with Flexible Offices



Equitas Strategy Partners
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 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
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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



The Intention Collective
www.intentioncollective.co
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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



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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



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

EO + Catalyst Partners



Second First
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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
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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
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FORUM TOPICS

- From Acorn to Oak: How private equity nurtures a \$1.2M Seed into a \$72M Money Tree
- Differences between financial and strategic buyers and how to determine which is best and how to find the right one
- The Partnership Post Mortem: Autopsying failed business alliances
- Beyond the Bottom Line: The new drivers of M&A success



Trainual
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Elizabeth Yarbrough-
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FORUM TOPICS

- Easy Button: Harnessing AI to Document and Delegate
- Team Accountability for Dummies
- Get Your Business Out of Your Brain



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
- What five things you can do to build a business that's "built to sell"



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?

EO Only Partners



AllianceBernstein
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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?



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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
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FORUM TOPICS

- CEO MISTAKES—CEO's 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



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

**Survey required prior to forum visit*



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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



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

Catalyst Only Partners



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FORUM TOPICS

- Conquer Your Challenges: Master the shifting landscape of tax laws and regulations while keeping top talent in your corner.
- Exit Planning Essentials: Don't leave your future to chance—create a savvy exit strategy with multiple pathways to success.
- Maximizing Company Value: Focus on key drivers that enhance your business's value, ensuring growth regardless of your exit plan.

In-Kind Partners



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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
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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



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HOTELS

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EVENTWORKS

OAK HALL
SINCE 1850
NASHVILLE

THOMPSON
NASHVILLE