

EO + Catalyst Partners



Amazon
www.aboutamazon.com
Courtney Ross
cpross@amazon.com
(615) 812-3653

FORUM TOPICS

- Brains Behind the Buy: How AI Knows What You Want Before You Do
- Power Sellers: Cracking the Code to Amazon's Marketplace Enterprise
- Cloud Royalty: What's Next From the AWS Throne
- Greener, Faster, Smarter: Building a Better Planet, One Package at a Time
- *subject to availability



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.



Biggest Goal
www.biggestgoal.ai
Micah Johnson
micah@bgboco.com
(619) 618-9994

FORUM TOPICS

- What can AI be automating in my business
- How to Use AI Agents to Automate things that weren't possible before
- Why using ChatGPT is barely skimming the surface of what AI can be automating.



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
- 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
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 City Living Group at Compass
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
Marcus Bowman
Marcus.bowman@claconnect.com
(615) 800-3430

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.cppadvisors.com
Abby Spaulding
abby.spaulding@cppadvisors.com
(615) 714-0911
Andy Faught
Andy.faught@cppadvisors.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



www.e2ekc.com
Sandra Kiger
sandra@e2ekc.com
(615) 300-7578

FORUM TOPICS

- Automation to the Rescue: How Tech Tools Protect Cash Flow
- Why Profit Doesn't Equal Cash. The #1 Mistake We See Entrepreneurs Make
- Why You Should Hire a Fractional Accounting Team Instead of DIY



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

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



Medical House Calls
www.medicalhousecalls.com
Eli Anding
Eli.anding@medicalhousecalls.com
(205) 541-2700
Stu Jones
Stu.jones@medicalhousecalls.com
(615) 330-8551

FORUM TOPICS

- Reclaim Your Health: The Concierge Medicine Advantage
- The New Age of Primary Care



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



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



Studio Bank
www.studiobank.com
Matt Pierucki
matt.pierucki@studiobank.com
(615) 218-7802

FORUM TOPICS

- Pivot: When Plan A Stops Working (and Plan B Doesn't Exist Yet)
- Lessons Learned: Marine Corps Leadership in the Business World
- Scaling Teams Without Losing Your Soul (Or Your Sanity)



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

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



Viking Mergers + Acquisitions
www.vikingmergers.com
Justin Cook
justin.cook@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
- What five things you can do to build a business that's "built to sell"



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?



Zander Insurance
www.zanderins.com
Kell Holland
kholland@zanderins.com
(615) 289-6055
Joe Deyo
jdeyo@zanderins.com
(615) 850-3349

FORUM TOPICS

- Employee Benefits Compliance: 20 Must-Haves Your Carrier May Not Deliver
- Beyond Health Insurance: High-Value Benefits That Cost Little to Nothing
- Cyber Insurance: You're Probably Buying the Wrong Policy - Cyber policies vary wildly, and the fine print matters
- Making Sense of the Property Insurance Squeeze
- COIs: Small Paper, Big Risk

EO Only Partners



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?



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
heidismith@ceocoaching.com
(949) 232-6647

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
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



Petra
www.petra.com
Mandy Buraage
mandy@petracoach.com
(615) 715-8305
Carter Gentry
carter@petracoach.com
(615) 587-9319

FORUM TOPICS

- Are You Building a Business or Running on a Treadmill? Discussion on owner dependence, decision bottlenecks, and how to build a business that thrives without you
- Culture Is Not a Perk, It's a Performance Tool - Explore how the strongest companies use culture to drive accountability
- From Vision to Execution: How to Align Your Leadership Team and Actually Get Stuff Done



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



Vaco
www.vaco.com
Jessica 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

Catalyst Only Partners



Strategic Financial Partners
www.strategicfinancialpartners.com
Mike Prokop
mjp@strategicfinancialpartners.com
(615) 435-4160
Cole Crocker
colecrocker@strategicfinancialpartners.com
(615) 435-4160

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.



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

