

STRATEGIC ALLIANCE PARTNERS



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

EO + Catalyst Partners



amazon

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

FORUM TOPICS

- Brains Behind the Buy - how AI knows what to do 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

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 an "AMA" (Ask Me Anything) session

Biggest Goal

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

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
Bradley Arant Boult Cummings LLP

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 CityLiving group

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 - emotionally or financially?
- Trends in financing start-ups

CONTINUUM PLANNING PARTNERS

Continuum Planning Partners
www.cppadvisors.com
Abby Spaulding
abbspaulding@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

e2E entrepreneur to Enterprise

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 ENTREPRENEURIAL OPERATIONS
JUSTIN COOK

EOS Worldwide
www.eosworldwide.com/
Justin-cook
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 HouseCalls

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 FINANCIAL PARTNERS

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

RANDOLPH BUSINESS RESOURCES

Randolph Business Resources
randolphpacctg.com
Mickey Randolph
mickey@randolphpacctg.com
(615) 202-5829

Trevor Randolph
trevor@randolphpacctg.com
(615) 804-8422

FORUM TOPICS

- The Hidden Cash in Your Business - finding money you didn't know you had
- Profit vs. Cash Flow - why your bank account never matches your P&L
- Numbers that Actually Matter - the 5 metrics every business owner should watch

Skillway
Premium Sales Coaching

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 A BOUTIQUE BANK

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 (our your sanity)

Tennessee Valley Group Inc.
Business Brokerage & Transfer Mediation

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

FORUM TOPICS

- From Acorn to Oak - how private equity nurtures a \$12M 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

ValVa VIRTUAL ASSISTANTS

ValVa Virtual
www.vavavirtual.com
Melanie Ammerman
melanie@vavavirtual.com
(404) 491-0483

Lauren Gall
lauren@vavavirtual.com
(404) 254-6685

FORUM TOPICS

- Delegation as a Catalyst for Growth - where to begin and how to succeed
- Profit-Drive Team Building - the evolution of fractional support to full-time
- The AI + Human Support Dream Team - leveraging technology without losing the human touch

VIKING MERGERS + ACQUISITIONS

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

WC DILLON COMPANY
Insight Risk Management

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

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



AB BERNSTEIN

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? Everything I should think about before selling and what to do after.
- Investment Outlook - hear from the world's largest independent financial research firm on what you need to know when making strategic decisions for your wealth
- Dislocation & Opportunity - the Markets are not complacent, so you shouldn't be either. There are always areas of the investment universe that create opportunity for those that are looking in the right places.
- As a global thought-leader, AB is happy to customize a topic and speak specifically to something that a forum is most interested in.

BRENTWOOD MD PRIVATE PHYSICIANS

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

FORUM TOPICS

- Longevity
- Health optimization
- Healthcare vs. sickcare

CEO COACHING™ international

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™
"Making Executives Effective"

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

Petra
www.petra.com
Mandy Buraage
mandy@petracoach.com
(615) 715-8305

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

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

FORUM TOPICS

- The Right Fit - identifying, hiring, and onboarding your Second-In-Command
- Elevate your partnership with your Second-In-Command in 3 steps
- Your Force-Multiplier - do you need an EA, COO, or Chief of Staff

VACO BY HICKSPRING

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

FORUM TOPICS

- Artificial Intelligence & Workforce Impact - how AI is changing hiring, productivity, and the skills companies need most
- Building High-Performing Teams in a Hybrid World - what leadership approaches are working right now for recruiting, retaining, and engaging top talent
- The Human Side of Digital Transformation - why so many transformation initiatives stall, and how to bring people along for the journey

Catalyst Only Partners



STRATEGIC FINANCIAL PARTNERS

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

Cole Crocker
ccrocker@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

Ripple Consulting Group

Ripple Consulting Group
www.rippleconsultinggroup.com
Katie Radel
katie@kateradel.com
(615) 830-5404

FORUM TOPICS

- From Founder to Thought Leader - leveraging your zone of genius (how to pick a "lane" that aligns with your goals)
- The PR Multiplier - turning visibility into valuation (using PR to prep for an exit)
- Nail Your Power Intro - an interactive session for founders (we create elevator pitches together "live")

A.RAY Hospitality

amp adscale marketing & print

e|spaces

LOEWS HOTELS

NASHVILLE AREA CHAMBER OF COMMERCE

OAK HALL SINCE 1888

OUTSOURCE ACCESS ESTABLISHED 1991 THE S&P

TOOLBOX9.COM

SAM'S PLACE

SPERRY'S ESTABLISHED 1906

THOMPSON NASHVILLE