

STRATEGIC ALLIANCE PARTNERS



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

EO + Catalyst Partners



Amazon
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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
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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 an "AMA" (Ask Me Anything) session

Biggest Goal

Biggest Goal
www.biggestgoal.ai
Micah Johnson
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(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
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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
- 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
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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 Compass
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Deborah Vahle
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FORUM TOPICS

- Nashville Real Estate: Building Wealth Beyond Your Business
- Nashville's Hidden Gem Neighborhoods: Where Smart Money is Moving Next
- Buying Your Home as an Entrepreneur: Tax Strategies That Actually Work

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CLA (CliftonLarsonAllen)
www.claconnect.com
Marcus Bowman
[\(615\) 800-3430](mailto:Marcus.bowman@claconnect.com)

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
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Andy Faught
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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



www.e2ekc.com
Sandra Kiger
[\(615\) 300-7578](mailto:sandra@e2ekc.com)

FORUM TOPICS

- Beyond the Books: How Automation Protects Margins and Strengthens Cash Flow
- Skip the DIY Trap: Why Fractional Accounting Is a Growth Accelerator, Not an Expense
- Building People Operations from Zero: What Founders Should Do from Day One



EOS Worldwide
www.eosworldwide.com/
Justin Cook
[\(615\) 336-7133](mailto:justin.cook@eosworldwide.com)

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
[\(205\) 541-2700](mailto:Eli.anding@medicalhousecalls.com)
Stu Jones
[\(615\) 330-8551](mailto:Stu.jones@medicalhousecalls.com)

FORUM TOPICS

- Reclaim Your Health - the concierge medicine advantage
- The New Age of Primary Care



Pinnacle
www.pnfp.com
Kevin Roddey
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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



Randolph Business Resources
randolphacctg.com
Mickey Randolph
[\(615\) 202-5829](mailto:mickey@randolphacctg.com)
Trevor Randolph
[\(615\) 804-8422](mailto:trevor@randolphacctg.com)

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
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FORUM TOPICS

- The 2026 Sales Cycle: How to Refine Each Step for Faster, More Reliable Revenue
- Building a Sales Team that Performs: Hiring Smart & Paying Right
- The Founder Bottleneck: When the founder is still the top salesperson
- Sales Q&A



Studio Bank
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Matt Pierucki
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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
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FORUM TOPICS

- From Acorn to Oak - wow 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



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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
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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 &
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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?



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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



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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? 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.

B R E N T W O O D M D
P R I V A T E P H Y S I C I A N S

Brentwood MD
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FORUM TOPICS

- Longevity
- Health optimization
- Healthcare vs. sickcare



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

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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



Petra
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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
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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
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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



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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

- 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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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")

