

# STRATEGIC ALLIANCE PARTNERS



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

## EO + Catalyst Partners



Amazon  
[www.aboutamazon.com](http://www.aboutamazon.com)  
Courtney Ross  
[cpross@amazon.com](mailto: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



APEXAIADVISORS.co

Apex AI Advisors  
[www.apexaiadvisors.co](http://www.apexaiadvisors.co)  
Marty Reed  
(615) 207-7590  
[marty@resolvedynamics.com](mailto:marty@resolvedynamics.com)  
Damon Tindall  
(615) 426-3710  
[damon@resolvedynamics.com](mailto:damon@resolvedynamics.com)

### FORUM TOPICS

- The 20-Year "Overnight" Success: Separating AI Signal from Noise. A historical lens on why 90% of current AI tools are distractions and how to identify the 10% that actually scale.
- Building the "AI-First" Culture: Leading Through the Friction. How to navigate the human element of AI—moving your team from "AI-masking" to proactive, ROI-driven innovation.
- The ROI-Driven Roadmap: Finding Your Next Best Step. A workshop-style session sharing the Apex model for identifying high-impact, low-risk AI pivots.



Baker Donelson  
[www.bakerdonelson.com](http://www.bakerdonelson.com)  
Chris Sloan  
[csloan@bakerdonelson.com](mailto: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  
[www.biggestgoal.ai](http://www.biggestgoal.ai)  
Micah Johnson  
[micah@bgboco.com](mailto: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](http://www.bcpas.com)  
Ben Smidt  
[bsmidt@bcpas.com](mailto: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](http://www.bradley.com)  
Russ Morgan  
[rmorgan@bradley.com](mailto:rmorgan@bradley.com)  
(615) 252-2311

### FORUM TOPICS

- The Good, the Bad and the Ugly: A Litigator's Perspective on Contracts:
- Lessons from the courtroom on what works—and what doesn't—in contracts
- Write Right or Don't Write At All: How to keep your emails from becoming Exhibit 1 at trial
- Do Your Diligence Now: Practical lessons to minimize surprises in milestone transactions and key company contracts
- Our Success Depends on Our IP: Smart strategies to protect, leverage, and monetize what matters most

# EO + Catalyst Partners



The City Living Group at  
Compass  
www.nashvillecityliving.com  
Deborah Vahle  
[deborah.vahle@gmail.com](mailto:deborah.vahle@gmail.com)  
(615) 335-0770

## 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



CLA (CliftonLarsonAllen)  
www.claconnect.com  
Marcus Bowman  
[Marcus.bowman@claconnect.com](mailto: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  
www.cppadvisors.com  
Abby Spaulding  
[abby.spaulding@cppadvisors.com](mailto:abby.spaulding@cppadvisors.com)  
(615) 714-0911  
Andy Faught  
[Andy.faught@cppadvisors.com](mailto: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](mailto:sandra@e2ekc.com)  
(615) 300-7578

## 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  
Justin Cook  
[justin.cook@eosworldwide.com](mailto: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](mailto:Eli.anding@medicalhousecalls.com)  
(205) 541-2700  
Stu Jones  
[Stu.jones@medicalhousecalls.com](mailto: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](mailto: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  
randolphacctg.com  
Mickey Randolph  
[mickey@randolphacctg.com](mailto:mickey@randolphacctg.com)  
(615) 202-5829  
Trevor Randolph  
[trevor@randolphacctg.com](mailto:trevor@randolphacctg.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  
www.skillway.com  
Dew Tinnin  
[dew@skillway.com](mailto:dew@skillway.com)  
(612) 366-4822

## 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

# EO + Catalyst Partners



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

## FORUM TOPICS

- Stop the Scam: Protecting Your Cash, Data & Reputation
- Lending Right Now: Rates, Terms & What's Getting Approved
- High-Tech, High-Touch: Boutique Service at Scale
- Q&A with Studio Bank Founder and CEO, Aaron Dorn



Tennessee Valley Group  
www.tnvalleygroup.com  
Jim Cumbee  
[jim@tnvalleygroup.com](mailto: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



VaVa Virtual  
www.vavavirtual.com  
Melanie Ammerman  
[melanie@vavavirtual.com](mailto:melanie@vavavirtual.com)  
(404) 491-0483  
Lauren Gall  
[lauren@vavavirtual.com](mailto: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  
www.vikingmergers.com  
Kyle Kerrigan  
[kyle@vikingmergers.com](mailto: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  
www.wcdilloncompany.com  
Chan Dillon  
[chan@wcdilloncompany.com](mailto: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](mailto:kholland@zanderins.com)  
(615) 289-6055  
Joe Deyo  
[jdeyo@zanderins.com](mailto: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



AllianceBernstein  
www.alliancebernstein.com  
Adam Sansiveri  
[Adam.Sansiveri@Bernstein.com](mailto: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](mailto: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](mailto: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

# EO Only Partners



**Culture Index**  
www.cultureindex.com  
**John Conger**  
[jconger@cultureindex.com](mailto: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 Borage**  
[mandy@petracoach.com](mailto: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**  
www.secondfirst.com  
**Megan Long**  
[Megan@secondfirst.com](mailto: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**  
www.vaco.com  
**Jessika Poirier Hatchell**  
[Jessika@Vaco.com](mailto:Jessika@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**  
[www.strategicfinancialpartners.com](http://www.strategicfinancialpartners.com)  
**Mike Prokop**  
[mjp@strategicfinancialpartners.com](mailto:mjp@strategicfinancialpartners.com)  
 (615) 435-4160  
**Cole Crocker**  
[colecrocker@strategicfinancialpartners.com](mailto: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

# In-Kind Partners



**Nashville Entrepreneur Center**  
[www.ec.co](http://www.ec.co)  
**Sam Davidson**  
[sam.davidson@ec.co](mailto: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



**Ripple Consulting Group**  
[www.rippleconsultinggroup.com](http://www.rippleconsultinggroup.com)  
**Katie Radel**  
[katie@katieradel.com](mailto:katie@katieradel.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")

