

STRATEGIC ALLIANCE PARTNERS



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

EO + Catalyst Partners



Amazon
www.aboutamazon.com

****Unable to schedule forum visits at this time**



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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



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FORUM TOPICS

- **Ask Me Anything:** Members are invited to bring questions, either individually or as a group, or an open discussion. We can explore a single topic in depth or address multiple questions, as time allows
- **Generative AI and the Law:**
Updates and what business owners need to know
- **Preparing to Sell Your Business**



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FORUM TOPICS

- **Delegation to Dollars:** How Executive Leverage Converts to Scaling Smarter & Faster
- **5 Traits AI Can't Replace:**
How to Pair Smart Technology with Skilled Human Support
- **The 40 Hour CEO:** How Intentional Limitations Can Unlock Your Full Potential in Business and Life



Biggest Goal
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FORUM TOPICS

- **#1 – by a landslide:** Anything to do with Claude Cowork
- **#2 – the shift** from "I have to operate my business to fit how a SaaS product I pay for works" to "screw it, I'm building my own internal tools."
- **#3 – "chat" and "prompting:"**
Already AI old-school



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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

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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



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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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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
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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



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FORUM TOPICS

- **Is Your Business Worth What You Think It Is?** The 8 drivers that make companies more valuable
- **CEO Dashboard:** The 6 numbers every CEO should know before they make another decision
- **From Indispensable to Invaluable:** A framework for solving owner-dependency once and for all



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FORUM TOPICS

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

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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**



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FORUM TOPICS

- **Bonus Depreciation Is Back:** How to use it
- **Tax Savings Tips for Individuals:** Health Savings Accounts, Cost Segregation Studies, and more
- **The Million-Dollar Tax Question:** Should you be an S-Corp?



Randolph Business Resources
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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



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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**



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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



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"



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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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BERNSTEIN

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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

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FORUM TOPICS

- Longevity
- Health optimization
- Healthcare vs. sickcare


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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**

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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

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FORUM TOPICS

- **Developing Leaders Who Can Lead Without You**
- **The CEO's Biggest Blind Spots**
- **Building a Business That's Worth More Than You**



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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?



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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

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FORUM TOPICS

- **7 Biggest Mistakes Entrepreneurs Make** (And how to fix them)
- **Retirement Planning:** For your business and your life
- **Disinheriting Your Uncle Sam**

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")

