

SUMMER 2019 EDITION



THE TOP 40 UNDER 40

Forty of the Most Accomplished Professionals Under the Age of 40

Featuring

ROCCO J. SARNI

Vice President and Top Broker
Tidewater Real Estate & Mgmt.

**UNDER 30 AND
ALREADY A
REAL ESTATE
TYCOON, BUT
DON'T LABEL
HIM A REALTOR.**

-Story on Page 6





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The staff of The Top 100 Magazine would like to express their gratitude for having the privilege of working with the brightest, most accomplished and esteemed professionals in the finance industry.

Through the combined efforts of our account directors, writers, production staff, and artists, as well as the cooperation of everyone who is featured in this extraordinary edition, I believe we are presenting our greatest publication to date.

I know that our readers will be equally impressed by these stories and appreciate the tremendous fortitude, dedication, and perseverance of these individuals, along with the many sacrifices they have made in the pursuit of their dreams.

It is my sincere wish that each and every one of these amazing professionals continue to experience success and my pleasure to present The Top 40 Under 40 Magazine.

Joseph Nunziato
CEO, Redwood Media

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2019

THE TOP 40 UNDER 40

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RAINSTAR CAPITAL GROUP

"Making it Rain Growth Capital for Entrepreneurs
and Commercial Real Estate Investors"

Kurt is well known and highly esteemed as an investor and consultant in the debt capital markets and has advised more than one hundred fund managers, investment bankers, fin-tech lenders, and specialty finance firms. He is equally renowned for his marketing expertise from his work as CEO of Rainstar Marketing which was launched in January of 2010.

Rainstar Marketing is a social media and promotional platform that specializes in lead campaigns for direct and correspondent lenders in the commercial real estate and business finance spaces. Mr. Nederveld current reach includes more than 29,000 LinkedIn connections within the banking, commercial real estate, and capital markets as well as a strong presence in all of the major social media networks. Through extensive, highly targeted campaigns in media outlets, search engines, blogs, and social media, Rainstar Marketing has established itself as an international leader in reputation management, search engine optimization, digital marketing, and strategic partnering.

Kurt's ambition, resourcefulness, and integrity has resulted in a fully developed conglomerate that encompasses almost every aspect of finance. He has overcome numerous business and personal challenges to reach this level of success, including being diagnosed with cancer at just 26 years old. Employing the same level of determination throughout his treatment, Kurt is now cancer-free and wholly engaged in a variety of industry and philanthropic pursuits.

In addition to several leadership roles in his church, Kurt is an active member of Gideon's International, the Institute of Reformed Biblical Counseling, the Association of Corporate Growth, the Equipment Lease and Finance Association, the Turn Around Management Association, the Risk Management Association and the Commercial Finance Association.

Kurt graduated from Calvin College, with a Bachelor of Business Administration degree. He is a dedicated husband and father, who enjoys reading, playing basketball, tennis, and jet skiing.

Be sure to visit www.rainstarcapitalgroup.com to learn more about Kurt Nederveld and Rainstar Capital Group.

To contact Kurt: Kurt@rainstarcapitalgroup.com.

Kurt Nederveld is the founder and CEO of Rainstar Capital Group, a multi-strategy, private equity firm, based in Grand Rapids, Michigan. Under Kurt's expert direction, RCG provides advisory debt capital through its multiple lending platforms. The Group currently works with over 250 registered lenders to assist clients with their commercial real estate, corporate finance, small business, and equipment financing needs. The firm finances clients from \$100k to \$500M in transaction size and typically works with clients doing \$500k to \$500M in annual revenue.

Since founding RCG in 2014, Kurt has continually integrated value-driven amenities, culminating in an extensive list of services that includes various lines of credit and advances, inventory and purchase order financing, production financing, multiple loan types, equipment leasing, and accounts receivable factoring. Additionally, RCG maintains an impressive investment portfolio consisting of residential and commercial real estate, distressed mortgages, and high-growth companies. In 2017, Kurt further augmented his robust portfolio by investing in web-based platforms, which focus on e-training for finance brokers, lead generation, borrowers, and lenders. The firm publishes its own magazine- "Rainstar Capital Group's Ultimate Lending Guide" which highlights all 250+ of its lenders so that clients can learn about the solutions for their equipment, business and commercial real estate financing needs. It also has built out extensive blueprints that walk industry clients through the process of accessing capital market products specific to them.

UNLOCK (TRANSACTION EQUITY) GROWTH BLUEPRINT

Rainstar Capital Group has built a unique lender platform of 250 registered lenders that finance clients that have commercial real estate, corporate finance, equipment and working capital needs. When a B2B client has tapped out their existing revolver or financing solution from a bank, how can the client access capital to grow their business?

Enter Rainstar Capital Group's "Unlock (Transaction Equity) Growth Blueprint" that shows the client how to access fintech financing products, inventory lines of credit, purchase order, accounts receivables and work in progress/production financing! Review the Blueprint to learn more:



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RAINSTAR
CAPITAL GROUP

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MESSAGE FROM THE CEO:
KURT NEDERVELD
"Understanding the Options to Access Debt to Grow your Business"

Connect with Kurt Nederveld on LinkedIn and Instagram:

<https://www.linkedin.com/in/kurtanederveld>

<https://www.instagram.com/rainstarcg/>



Rocco, can you tell us a little about Tidewater Real Estate and Management?

Tidewater has been around since the 70's. The man who founded Tidewater is my mentor, and like a father to me, literally the Plato to my Aristotle. We specialize in the acquisition, sale, and management of multi-family apartment buildings and we have been very successful in this arena. Commercial real estate sales are very different from residential real estate sales; there's no staging or sentiment involved. It's not so much about making an emotional connection with your buyer or seller. It's just about the raw numbers.

You're an executive but you still do sales. Why?

My VP role allows me to make decisions for the company, but I need to be out there to know what kind of decisions to make. I can't sit in an office all day and still be on top of what's going on out in the field. I enjoy negotiating and making acquisitions for the company but in order to do this effectively, I need to interact with developers, supers, property owners, and investors.

So you attribute your success more towards the Realtor role?

I've made a good living by selling and managing property, but I don't call myself a "realtor." That term always makes people think you sell houses. There's just so much more to what I do and none of it involves selling houses. We manage about 2000 units across New Jersey and I'm currently overseeing the development of a 350-unit luxury rental property. Plus, it all contributes to the overall growth of communities. Schools get better, neighborhoods are restored, and families thrive.

So there's a philanthropic side to you?

<laughs> Well, family is important and I'm all about that. Don't get me wrong, the money doesn't hurt, but I'm a giver by nature.



ROCCO J. SARNI

We Talked with Rocco J. Sarni, Vice President and Leading Broker for Tidewater Real Estate and Management, in Hackensack, New Jersey.

I'm a father with my own family now, so of course I appreciate the intrinsic values of community development. My son is 19 months old and it's nice to think I'm trying to create a better place for him to grow up in.

You're pretty young to have achieved so much. What's your secret?

I got an early start. I grew up in a big Italian household and most of my relatives are tradesmen; plumbers, contractors, electricians, and carpenters. I worked for them when I was still in high school and I probably would have followed in their footsteps if not for my mother. She has been a property manager for over 30 years, so I was exposed to that side of things as well and I began working for Tidewater at a very, very young age. I took my first sales call at 11 years old. All that experience definitely gave me an advantage and I'm ambitious by nature.

Did you go to college?

By the time I finished high school, I kinda knew I was destined for real estate, but I actually studied law at first at Seton Hall. I have a passion for the law and always wanted to be a lawyer, but my roots were in this business and I love this more. So, I enrolled in The American School of Business. Experience always beats education anyway.

I understand that you were the youngest person in the school's history to be licensed. Is that true?

Yes. Youngest to earn a Broker's License.

You have a lot on your plate with family and work. How do you manage?

Maintaining the balance between work and home life isn't easy... there are not enough hours in the day. Plus, I have some outside interests that I try to find time for. My goal is to work as hard as I can now, while I'm young, so I don't have to work as hard later.

You mention outside interests. Can you elaborate?

Well, let's see...I'm really into motorcycles. I'm chairman of the board for a political action committee called Construendo il Nostro Futuro, which recognizes and promotes the contributions made to this country by Italian Americans and supports parties with the same interests. This is important to me because it helps to preserve the traditions and values of my culture.

We've heard that this year alone, you're on track to sell over \$50M. True?

<laughs> Yes, I have surpassed that as of today, but we still have a lot of 2019 left.

Lastly, what's your motivation and what one word describes you?

I don't really have one word I want to be described as. If I can use a few words, I'd say persistent, calculated, and loyal. I just know that I never want to be accused of being a millennial. <laughs>



"I've made a good living by selling and managing property, but I don't call myself a "realtor." That term always makes people think you sell houses. There's just so much more to what I do and none of it involves selling houses."

Rocco J. Sarni is a licensed NJ real estate broker and specialist for fully integrated real estate services. Tidewater Real Estate Co. is a one-stop-shop for the managing of, maintaining of, and acquisition of multi-family apartment buildings and all aspects therein, including but definitely not limited to, award-winning property management, investment management and acquisitions, day to day operations, leasing and marketing, long term holds, development and construction, security, IT, and analysis and assessments.



ARIEL TAVOR

Ariel Tavor is the founder and principal managing director of Lions Assurance Financial. His agenda for Lions Assurance Financial is to provide his clients a service that maintains the highest professional value. Specializing in the business-to-business market has allowed proficient expertise in providing ongoing consulting services in the focus areas of business advisory, capital markets, and risk management.

Ariel works with CEO's, capital investment funds and boards of directors, advising his clients in matters of executive compensation, business plan design, mergers & acquisitions, due diligence, and asset financing.

Ariel has 10 years of experience in the financial services industry. He has worked in insurance and investment companies to analyze client's financials and make suggestions on allocations based on defined objectives, as well as maintaining long term relationships.

Ariel's comprehensive experience has allowed him to work closely with CEOs of companies and their executive teams from

diverse industries, such as trucking, hospitality, commercial real estate, insurance, manufacturing, and technology. He has helped lead companies through the challenging decisions around buy-sell agreements, deferred compensation, employee group benefits, succession planning, mergers and acquisitions, valuations, and business sales.

Ariel currently oversees their family office investment group and sits on the board of directors of several companies and real estate developments. Their investment group controls a portfolio of companies in multiple industries and collaboratively, they have holdings in companies specialized in automotive distribution, real estate, asset management, corporate travel, ink-mailing, manufacturing, e-commerce, financial services, management consulting, enterprise technology, and food concepts.

In recent years there has been a transition into fund allocation towards limited partnership investments in venture capital, private equity, and REITS, within individually underwriting opportunities.

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- Buy-Sell Agreements | Deferred Compensation
- Employee Group Benefits | Exec. Compensation
- Succession planning | Mergers and Acquisitions
- Due Diligence | Valuations | Business Sales/Plans



Michael Lupolover, Esq. is a successful attorney and businessman who considers himself a true serial entrepreneur as he loves to learn, explore and pursue new business ventures. He is the founder and owner of the Law Offices of Michael Lupolover, PC, a law firm that focuses on debt solutions and consumer and small business protection.

Born in Brooklyn, NY to immigrant parents of the former Soviet Union, Michael is the first member of his family to attend and graduate college from in the United States. He graduated from Hofstra University School of Law with a JD and is admitted to the bar to practice law in several states including New York, New Jersey and the District of Columbia.

Michael takes great pride in his work and focuses on all aspects of consumer protection by providing legal guidance and assistance to financially troubled individuals and small businesses to help them with their finances and enforce their rights. His passion is to help find the best options to resolve his clients' financial concerns, whether it is through renegotiating existing terms or obtaining new financing.

Michael initially began his legal career as a creditor's rights attorney, where he saw the stress and financial struggles that individuals experienced while they were being relentlessly

pursued by creditors. He also witnessed some of the cruel and unsympathetic tactics that creditors used against clients. After this experience, he quickly decided to change his focus as a lawyer and concentrate on helping individuals and small businesses resolve their financial issues instead of trying to persecute them. In addition to helping individuals get out of financial debt, he also expanded his business to include pursuing prosecution against violating creditors.

Michael's clients have been able to resolve over \$500,000,000 in liabilities and he has also assisted in recovering over \$10,000,000 in awards and damages from overly aggressive violators.

As an entrepreneur, Michael's strengths include building new businesses that grow in size and capital and ultimately double and triple in revenue growth. He is also an experienced real estate investor/developer and he has successfully invested in numerous real estate and construction projects that feature over 100 units for multifamily housing.

In addition to his professional accomplishments, Michael is involved with many community and charitable organizations. He has also received numerous awards and recognition for his charitable efforts. In his free time he enjoys boxing, boating, fishing and traveling with his wife and children.

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Michael Ott is a managing partner at Summit Wealth Strategies, a successful financial planning firm that offers a full range of financial products and services. The primary goal of the business is to provide advanced and profitable financial strategies to each and every valued client.

After graduating with a dual Master of Science degree in accounting and business management from Drury University in Springfield, Missouri, Michael began his career in financial services as an investment banking manager with Citi. In that role, he successfully built an investment management team that grew in excess of 900% in acquisitions of assets and receivables over the 4 years he managed the division.

In 2006, Michael took his financial expertise and experience in a new direction and partnered with his father, Gary, in the financial planning industry at Summit Wealth Strategies. Together, Michael and his father built a highly successful financial planning organization with a strong and experienced team to manage assets for clients all over the country. When his father retired, he became managing partner and grew the firm to over \$700 million in assets under advisement. In 2010, Michael became a Certified Retirement Planning Specialist (CRPS®) through The Wharton School with an emphasis on advanced financial wealth management, social security and Medicare planning, charitable planning, family protection and legacy planning.

Michael and the entire team at Summit Wealth Strategies are committed to supporting their community through sponsorships, donations and volunteer work. Michael is personally involved in several charitable organizations including starting a young professional's foundation for Saint Luke's Hospital in St. Louis as well as supporting organizations that provide help and assistance to those affected by Down syndrome.

Mike lives in Chesterfield, MO with his wife, Kelly, and their three children. In his free time he loves attending sporting events and enjoys coaching youth baseball and soccer.

MICHAEL OTT

Managing Partner, Summit Wealth Strategies,

ABOUT SUMMIT WEALTH STRATEGIES:

At Summit Wealth Strategies we value integrity and professional excellence above all. Our capabilities, experience and fierce collaborative approach, allow us to provide you a full range of financial products and services. Our primary goal is to make you feel safe and confident.

We focus on building authentic partnerships, with one simple mission; to help provide advanced and profitable financial strategies to you, our valued client. We are in constant pursuit of open communication to give us an in-depth understanding of each of your unique financial needs.

We look forward to helping you take control of your financial future.

Q&A

What inspired you to pursue this career?

I grew up watching my father, Gary, build a business in the financial services industry. All I knew as a kid was that it was pretty cool going into the office with him and watching him day in and day out...and eat all the candy they had for client meetings!

As time passed, I started thinking about how hard my dad was working to build this business and I started asking him questions about what he wanted to do with the business when he retires. He really did not have an answer, other than he wanted to make sure his clients were taken care of.

So, as I entered college, he and I agreed that one day, it would be great to partner up, provided things continue to go the way we want. At the end of the day, my inspiration was simply the pride I had in what my dad had created and built and wanting to ensure that all his hard work continued well beyond his working years.

You've acquired some impressive accolades, can you mention a few?

I've never really been the type of person looking or wanting public recognition. The greatest accolade I have ever received is the comment from a client at the end of their meeting: "Mike, I can't tell you how much we appreciate everything you've done for us. It's just something about visiting with you in that I always feel so much better about our direction when we're done." Hearing that is all the accolades I need.

The other stuff, with regards to *Wealth Manager of the Year*, my Wharton School of Business *Post-Graduate Certification in Retirement Planning*, and becoming an A.I.F. (Accredited Investment Fiduciary), are a few of the things I've accomplished, but they pale in comparison to knowing my clients feel great about their lives and the work we are doing for them.

You maintain an active profile within the community. Can you tell us about some of the organizations you support?

Well, the greatest organization I support right now is the STL Recruits Legacy Baseball Team! That is my son Brandon's travel select baseball team that I have coached for six years now. I love all those boys as if they are my own and I have incredible passion for helping them grow in to amazing young men.

I also have been president of the Young Professionals Foundation for St. Lukes Hospital, going on eight years now.

"I've never really been the type of person looking for or wanting public recognition. The greatest accolades I have received are positive comments from clients."

Aside from all the fantastic work our organization does in the community, I love the simple fact that we give young business people and entrepreneurs a platform on which to launch their philanthropic lives. I have also participated in annual giving and fund-raising for other local charities in St. Louis such as, The Miriam School, Marygrove, Lifebridge, Living Water, and the Ronald McDonald House.

Tell us a little about the direction you see your company heading too in the future.

Well, given how I came into this business, I would absolutely love to see my kids join me one day in helping our clients. My ten and thirteen-year-old son and daughter have already started interning for me over the summer on little projects and hopefully, I don't scare them away so that they will want to come and work with me the way I did with my dad.

As a firm though, I am not looking to build this monstrosity of a company. I want to remain a boutique firm that specializes in the lives of those we work for.

If we can accomplish that simple feat, I know we will always be able to come through on the promises we have made to all our clients who have entrusted their financial lives to us.



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Wayne Tsao understands that innovation, adaptability and a positive attitude are integral to business and professional success.

As CEO and co-founder of ECARD Inc., a leading New York-based, FinTech company, Wayne leads his twenty-person team by such example.

Recognizing the expense and time-consuming challenges associated with any cross-border payments, Wayne designed a payment solution that takes the hassle out of making one's money work globally, redefining how people bank in the world.

For international travelers, ECARD's advanced, low-fee, 'SmartWallet' technology comes in the form of a UnionPay International card, a globally accepted banking pass, and mobile app, eliminating frictions of payments and adding value to daily purchases. Many perks include discounts on Expedia.com, shopping outlets, and many more global rewards!

Earlier on in his career, Wayne, gained significant experience in payment methodologies. He worked for some *Fortune 500* remittance and payment companies. He is bilingual in both English and Chinese. He was born in Asia and grew up in New York, this background helps him expertise in bridging both cultures together and working with people with various culture background.

Under his leadership, ECARD was recently selected as a *Top 10* payment and card provider for 2018 by *Banking CIO Outlook* magazine, earning a spot on its cover. "Travel globally Welcome locally" is a motto he continues to motivate his team with.

A family man, Wayne enjoys spending time with his child, showing her that life is worth living so long as you're doing well for yourself and others.



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Danielle Niderost and **Ryan Southwick** are financial advisors for Eagle Strategies LLC, a registered investment advisory firm, and cofounders of Zephyr Financial Strategies & Insurance Solutions, a company that provides a full suite of wealth management and business financial services.

Early on in their careers, Danielle and Ryan engaged to provide assistance for a business owner client and the collaboration was ultimately successful. They have been working together as partners ever since and love that their combined strengths can help to explain and describe processes and solutions in ways that their clients can understand. Having a balance of perspectives and strengths can make it easier for their clients to feel comfortable, knowing that both Ryan and Danielle are reviewing the recommendations that the clients receive.

Through Zephyr Financial Strategies & Insurance Solutions, Danielle and Ryan provide a full range of high-quality, precisely tailored, investment and insurance advisory services for both businesses and individuals. Visit them online to learn more about executive benefits, succession planning, key person insurance, funding buy/sell agreements, funding deferred compensation, health insurance**, 401K and retirement plans, and much more.

Before beginning a career in financial services, Danielle had a background in accounting and internal audit. During the span of her time working in finance, she attained FINRA licenses, *Series 6*, *Series 7*, *Series 63*, and *Series 65*. She is a registered representative with NYLIFE Securities LLC (member FINRA SIPC), a licensed insurance agency, and maintains all the licenses and certifications necessary to offer retirement planning, business employee benefits, tax diversification strategies*, investment vehicles, and much more to her clients. She is also an agent with New York Life Insurance Company, CA Insurance Lic. # 0K19831.

Danielle's primary goal is to develop long lasting relationships with her clients and to provide support throughout the initial phases as well as the subsequent fulfillment of those financial strategies. Since many of her clients are experts in their fields, she allows them to focus on running their business by reducing the burdens associated with planning their finances. Danielle says, "The most rewarding part of my career is seeing clients attain their personal and business goals. Integrity and honesty are paramount. Doing the right thing ultimately yields a positive outcome for everyone involved."

Ryan is a serial entrepreneur with over a decade of experience that encompasses finance, consulting, IT, and executive management. He is a registered representative for NYLIFE Securities LLC (member FINRA/SIPC), a licensed insurance agency, and currently holds FINRA *Series 7*, *Series 65*, *Series 6*,



and *Series 63* licenses. Over the course of his career, Ryan has worked with many prominent companies such as AT&T, Verizon, Quest Communications, and TXU Energy. He is especially skilled at explaining complicated matters in simple ways, which aids his clients in understanding their options and making sound financial decisions. His consultative approach to financial planning also helps clients to crystallize their goals and understand their options to accomplish them. He is also an agent with New York Life Insurance Company, CA Insurance Lic. # 0179762.

Before Ryan entered the financial services world, he had extensive practical experience, coupled with an academic foundation that includes a Bachelor of Science degree from U.C. Berkeley. His deep math and science academic background aides him in providing analysis on client's financial needs. This has been integral to both the operational and service aspects of business.

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Daniel Selarz is the founder and managing attorney of Selarz Law Corp., a prominent personal injury firm based in Los Angeles, California. Mr. Selarz specializes in personal injury litigation with a focus on motor vehicle negligence and premises liability. Since establishing the Firm in 2014, Mr. Selarz and his team have amassed over \$13M in verdicts and settlements. The firm was recently recognized as a *10 Best Law Firm* by the American Institute of Personal Injury Lawyers, following a \$9.5M settlement on behalf of an injured pedestrian, which was recognized as California's 4th largest personal injury settlement of 2017. As a result of his exceptional success record, Mr. Selarz was selected as a 2018 *Top 40 Under 40 Attorney* by the National Trial Lawyers Association and was recently admitted as a member of the *Multi-Million Dollar Advocates Forum*.

In addition to his caseload, Mr. Selarz serves as an adjunct associate professor of law at Southwestern Law School, where he teaches, *Civil Pretrial Practice*, and has also led seminars for students and faculty members such as, *Off the Record with Plaintiffs' Attorney and Defense Attorneys*, *Off the Record with Transactional Attorneys*, *Recent Alumni & How they Found their Jobs*, and *Excellence in Teaching Workshop: Peer Mentoring-The Faculty Version*.

Mr. Selarz also manages the Firm's externship program, which allows 1-2 law students a semester from schools including UCLA, Loyola Marymount, Southwestern and Pepperdine, to gain hands on experience. Mr. Selarz is a proud member of the American Bar Association, the Los Angeles County Bar Association, the American Association for Justice, Consumer Attorneys of California, and Consumer Attorney's Association of Los Angeles. He is admitted to practice before all the California Courts and the United States District Court, Central District of California.

Mr. Selarz received his bachelor's degree in business economics from the University of California Santa Barbara in 2009 and received his Juris Doctor degree from Southwestern Law School in 2012, where he earned *Dean's List* honors each year. While in law school, Mr. Selarz was selected as a staff member of the *Southwestern Law Review* and competed on behalf of the school's *Trial Advocacy Honors Program*, where his team was a finalist in the *American Association for Justice (AAJ) Student Trial Advocacy Competition*. He worked as a law clerk for Veatch Carlson throughout his final year of law school and, upon being admitted to the California Bar, began working as an associate in the firm's Law and Motion Department. Prior to joining Veatch Carlson, Mr. Selarz externed for the Honorable Otis D. Wright II of the United States District Court, Central District of California and for the Los Angeles City Attorney's Complex Litigation Department. When he's not at the office or in the classroom, Mr. Selarz can be found exploring Los Angeles with his English Bulldog, Otis, who has become a beloved member of the firm.

Practice Areas:

Motor Vehicle Accidents
Bicycle and Pedestrian Accidents
Dog Bites
Slip and Fall Accidents
Wrongful Death and Catastrophic Injuries

Notable Verdicts and Settlements

\$9,500,00.00 truck vs. pedestrian case
\$450,00.00 uninsured motorist auto vs. auto
\$175,000.00 auto vs. auto
\$125,000.00 defective product
\$100,000.00 pedestrian vs. auto



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Gregory Selarz is an experienced trial attorney with the prestigious, California-based firm, Veatch Carlson, LLP.

Gregory joined the *Martindale-Hubbell* AV rated firm in 2017, following a prior role with Early Maslach, where he distinguished himself by completing four jury trials to verdict including three as lead trial attorney. In recognition of his success, Gregory was selected to participate in a one-week, Los Angeles based Trial School to develop his trial skills and see how they compared to trial attorneys across the country.

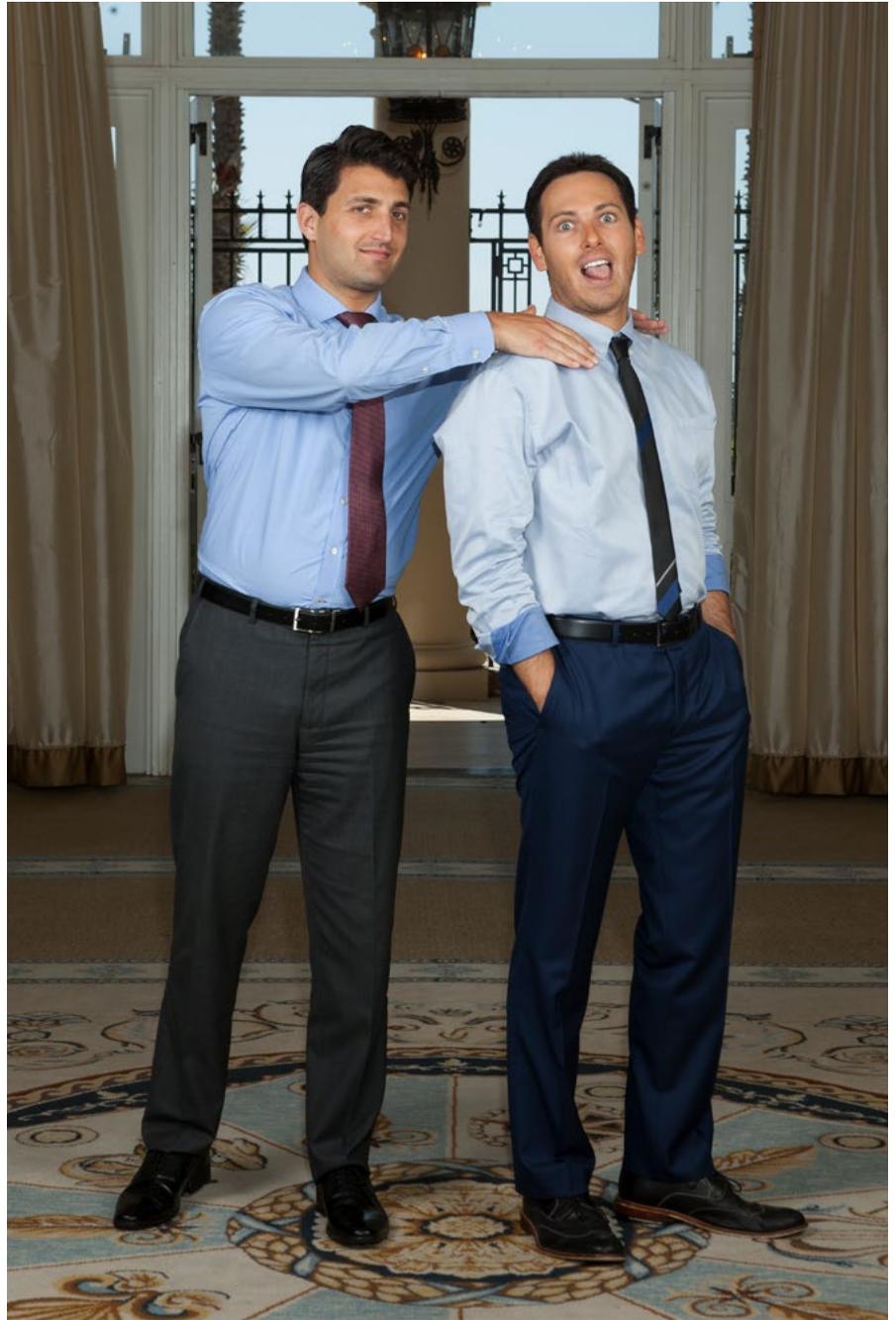
Presently, Gregory is engaged in the defense side of civil litigation and focuses on high-exposure cases that involve severe and traumatic injuries. As the primary attorney in these cases, he not only prepares the pre-trial defense, but conducts the trial in court. Along with his partner Robert MacKey, Gregory is responsible for all aspects of the trial, from jury selection through closing arguments. Because of the complexity of the cases, and severity of injuries, the jury trials he is entrusted to handle usually involve the opposing party requesting millions of dollars.

Gregory pursued civil litigation as a specialty because it allows him to try cases that have a profound impact on the lives of the clients he represents. "It is especially gratifying to actively participate in the trial process and I feel fortunate to have gained invaluable experience at an early age" Gregory states. Since joining Veatch Carlson, Gregory has obtained three defense verdicts, in which the opposing parties had collectively requested the jury to award in excess of \$12 million dollars.

When asked to credit his achievements, Gregory cites his family, specifically his brother, Daniel, who has his own plaintiff firm, which helps those who have been injured, as well as his trial mentors, and the role sports has played in his life. As a Los Angeles native, he attended the University of California at Santa Barbara before going on to finish his BA in history at University of California, San Diego.

A lifelong athlete with a competitive spirit, Gregory was a pitcher for the UCSD baseball team. It was during this time that he cultivated his work ethic and developed a unique philosophy that would catapult his legal career, since trial work is just as much of a competitive arena.

"Success comes from preparation and the confidence knowing that you worked harder



than your opponent. The goal is to focus on what you can control and not dwell on the variables", Gregory states.

Gregory matriculated to Southwestern Law School, where he was a member of both the *Law Review* and the *Law Journal*. He was also in the *Trial Advocacy Honors Program*, where prominent LA attorneys instruct students on the skills necessary for trial.

Before completing his law degree, Gregory authored and published an article on when, if ever, should California permit punitive damages in texting while driving auto accidents.



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EvoShare is a Berkeley-based FinTech company that enables you to save for your retirement, grow a college fund or reduce your student debt simply by doing your daily shopping. The service allows users to get a portion of what they spend at their favorite local businesses and online vendors to be applied toward a retirement account, college savings fund or paying off a student loan. EvoShare helps users save for the future without changing their spending habits or cutting into their paycheck. EvoShare is designed to overturn the traditional tension between spending and savings – powering retirement savings through everyday spending.

EvoShare works with more than 10,000 local and online businesses across the country to help customers get the most out of their purchases. As the retirement crisis and student debt crisis burden millions of Americans, EvoShare is helping its users take greater control of their financial futures, while at the same time helping businesses give back to the communities that support them. Sign up for EvoShare's unique benefits and start securing your financial independence today.

FEATURED IN:



Eugeny Prudchyenko is the co-founder and chief executive officer of EvoShare, a solution that turns American workers' spending into a new source of automatic retirement savings. EvoShare works with over 10,000 online and brick-and-mortar merchants, and recaptures up to 30% of employees' purchases. They then turn these rewards into 401(k) / 403(b) contributions, college fund savings or student loans payments through their fully vetted proprietary process. EvoShare has been featured in numerous media outlets and publications such as Debt.com, Money Peach, Forbes, Inc., and The Huffington Post.

Mr. Prudchyenko is a serial entrepreneur and experienced chief executive officer with a proven track record founding, leading, and selling multi-million dollar companies. Together with Daniil Tseytlonok, the company's co-founder and chief technology officer, they are bringing their combined expertise to the journey with EvoShare.

EvoShare's model for applying cash-back toward retirement was inspired by Mr. Prudchyenko spotting a Prudential billboard with the words, the best donation is donating to your retirement. "This made me think; what if someone were to streamline popular cash back solutions to people's retirement accounts? This is how EvoShare's cash-back service was born", he said.

A seasoned strategist, negotiator, and leader, Mr. Prudchyenko continues to elevate and shape EvoShare's impact and team. He holds a master's degree in physical sciences from Donetsk National University and is a member of the National Association of Plan Advisors (NAPA) and Forbes Financial Council. Away from his business, he enjoys being with his two children, Anna and Pasha.

www.evoshare.com | (800) 828.9501 | info@evoshare.com

RICHARD VAZQUEZ, CLTC

Managing Director, The Hotaling Group



Richard Vazquez started working in the financial services industry when he was just 20 years old. With his focused attitude and keen networking strategies, he worked his way into an executive position. His philosophy was, always find ways to make key introductions to help others.

Today, Richard is a managing director at The Hotaling Group, a full service risk management family office. He is an expert in business development and focuses on identifying potential clients as well as recruits; engaging them in conversations about their financial and business goals. Richard advises them on the full scope of financial services his firm offers including estate planning, employee and executive benefits, property & casualty coverage lines, compensation and non qualified retirement planning services. With a deep focus on tax strategy and mitigation planning, Richard assists clients with developing the best strategies to preserve their wealth, assets and estates.

Richard originally began his career in financial services with Northwestern Mutual, where, as financial advisor and field director, he acquired forty accounts within his first six months, building his book and achieving the prestigious *Pacesetter First 40 Award* - a milestone that less than 10% of the industry achieves. In that role, Richard also successfully developed the agency's internship program, which climbed in rank from 78th to 20th out of the nation's 80 internship programs. When Richard transitioned to Lenox Advisors, he built a team of cutting edge advisors that surged from zero to two million in unit production in just three years.

As a young professional, Richard found that networking was the best way to gain knowledge and first hand insight into the business industry. He joined several networking organizations and recently finished a three year term as president of BNI (Business Networking International) Bryant Partnership, a global networking organization.

Richard recently developed his own exclusive and elite networking organization called Executive Partners EP. His goal is to create connections and establish a forum where professionals can collaborate, build relationships and ultimately grow their businesses and advance their careers. He plans to establish additional chapters of this networking group in New York City, Westchester, and Long Island by the end of 2019.

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Born in Brooklyn, Richard grew up on Long Island, but spent time as a child in Argentina, where he quickly learned the Spanish language. Today he remains bilingual and is fluent in both English and Spanish.

In addition to his professional accomplishments, Richard seizes opportunities to excel at extreme sports. He enjoys bodybuilding and competed in a semi-professional *NPC Competition* in 2018. In that competition, he ranked among the *Top 10* on stage, competing against professional bodybuilders. Richard is looking forward to biking the great wall of China in 2020.



After gaining years of executive level experience at renowned, global companies, **Lauren Griewski** transformed her passion for living a SOUL EXPRESSED abundant life, into a thriving purpose-driven business. Lauren is the founder and CEO of SOUL EXPRESSED, a transformative company that reunites people with their true SOUL-selves and moves individuals to build businesses they LOVE in harmony with their dreams.

Lauren is a 4-time *Ironman* finisher, triathlon coach, and certified yoga instructor, who has studied human expression, quantum physics, high-performance living, and executive life coaching. She shares, “When we EXPRESS from our true nature, connected into our SOUL-self, everything beyond our wildest imagination is possible. When we stay repressed, it can manifest into depression, anger and unnecessary suffering.” She loves to support people in coming home to their SOUL-selves to freely EXPRESS who they are while monetizing their gifts to reach unlimited freedom, uncapped earning potential and abundant joy.

Lauren always asks her clients, “Are you ready to EXPRESS your true self? Are you willing to be seen? Are you up for creating a life-changing

business that makes you abundantly wealthy and impacts people all over the world?” She focuses on entrepreneurs who are stuck and feel overwhelmed in their current reality to fast-track their worlds in having freedom and abundance with time, money and location.

She explains the focus of her brand, “I reach driven professionals who feel stuck or frustrated, overwhelmed by where to start or how to scale, including those in corporate jobs experiencing the ‘golden-handcuffs’ dilemma. People are inherently valuable and somewhere inside of society we start to equate our value to the company we work for, title on our business card, school we attended, town we live in, parents we were born into, and so on. YOU ARE SO MUCH MORE VALUABLE THAN ANYTHING OUTSIDE OF YOU. When we search for significance by external validation, circumstantial factors or other people’s opinions we are NEVER satisfied.”

Lauren explains that there came a point in her corporate career, working as a successful professional in the world’s most sought-after organizations, where she wondered, “Is this ALL I’m here for? There’s got to be more!” She longed to live into her fullest expression of her gifts and in the creation of generous abundance and freedom.

She’s created a proven and tested program, SOUL EXPRESSED™, designed to support people to grow highly profitable businesses from their SOUL-self, EXPRESSED freely in the world. Lauren leverages her unique 15-years of experience transforming businesses, including over 6 years as a Facebook executive, where she was a leader in the tech partnerships and advertising divisions. Her program offers innovation that is accessible, digital tools, automated systems, and direct support for people to grow abundantly profitable businesses aligned to their gifts.

Lauren is clear that the most important asset we have are PEOPLE aligned to their SOUL-selves. Her fool-proof proprietary system helps thousands of people to freely EXPRESS their gifts and generate an overflow of revenue so they can stop worrying, what she calls “SOUL-VIVING” and live a purpose-driven life that is SOUL-THRIVING! She adds, “With the SOUL EXPRESSED™ system, you eliminate all of the guess work and follow the exact blueprint that I used to leave my first-class job at Facebook and fully express myself in the world, all while scaling my own business to revenue results I had only dreamed of!” Lauren adds, “When we’re connected to our SOUL-self and freely EXPRESS who we are – we can have it ALL!”

Are you ready to EXPRESS your true self and create a life-changing business you LOVE that makes you abundantly wealthy while impacting people all over the world? If so, Lauren warmly welcomes you to schedule a free consultation and receive your *Top 40 Special Offer* at www.soulexpressed.com/top40 because YOU matter!

Lauren Griewski
Founder and CEO of SOUL EXPRESSED
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Facebook: @laurengriewskisoul

Daniel Kirzner is president of The Clearstone Group, a full service property management and investment firm that specializes in the acquisition and management of quality multi-family and mixed-use properties in New York City and New Jersey. In his present role, Daniel is charged with the supervision and maintenance of a portfolio that encompasses approximately one thousand units across fifty buildings. His responsibilities include direction of the daily operations, expense and budget management, compliance, and ensuring the growth of the company through marketing strategies and customer retention.

Daniel established The Clearstone Group in 2016 and in just under two years, led it to its current position as a leader in the multifamily and mixed-use sector. The company's operations are trademarked by their level of hands on management, commitment to excellence and uncompromising integrity, which is indicative of their level of loyalty to owners and tenants. In addition, The Clearstone Group utilizes high tech management and investment feasibility software, allowing it to compete with firms that are significantly larger.

Daniel is well known and highly regarded by both clients and colleagues for his skillset and numerous advancements in the real estate arena. He credits this success to extensive practical experience and his commitment to making a difference within his community, as well as in the industry. He also acknowledges the benefits of growing up in a family that has been in real estate for more than thirty years and a firm educational foundation. Daniel attended Fairleigh Dickinson University in New Jersey, from which he earned a Bachelor of Arts degree in business and science. He also holds a New York State Real Estate Brokers License.

Over the course of his career, Daniel has completed several impressive transactions, including an eighteen million dollar contract in early 2018 and a 180 unit residence, which he closed in under five days. The multi-unit deal resulted in a twenty percent increase of rent and significantly raised the property's value. In addition, Daniel contracted a 189 unit property, financed by Freddie Mac, participated in the development of an affordable housing complex and is redeveloping 4 luxury rental buildings in Brooklyn. In the second quarter of 2019, The Clearstone Group, under Daniel's expert guidance, has realized an impressive 500% increase in revenue.

When he is not engaged with business operations, Daniel enjoys skiing, scuba diving, and travel to Israel, Florida, and Vermont with his family.



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BLW
B. Lawrence Watkins
& ASSOCIATES, PC

Bernie Lawrence-Watkins fell in love with music and the arts at a young age, while attending a performing arts high school in New York City. When she was in college at Howard University in Washington DC, her brother, a talented musician received a recording contract that unfortunately fell through because it was not a reputable deal. It was at that point in her life that Bernie became determined to go to law school and become an entertainment lawyer so she could get the best deals for artists and entertainers. After graduating from Howard University with a BBA in marketing, Bernie went on to attend the University of Baltimore Law School and received her Juris Doctorate in 1995.

After graduating from law school, in 1996 Bernie moved to Atlanta to live and work in a geographical area where the entertainment industry was prominent. At that time, the entertainment industry was rapidly growing in the Atlanta region. She began working for Kilpatrick Stockton LLP as a litigation coordinator, eventually

moving into a role as a contract attorney, while beginning her entertainment representation career on the side.

In 1999, Bernie acquired an entertainment client who was working with the artist Ludacris in the early years of his career. She explained, "This client ended up composing and producing six records for Ludacris and that was the start of building a name for myself in the industry." She eventually began representing more clients working with additional famous names in the industry, including Puffy and Luther Vandross. While she was establishing her career and building a name for herself in the music and entertainment world, Bernie was still working full time for a local governmental agency. She explains, "I felt like I was working two full time jobs between the entertainment work and the agency. At the end of 2002, I finally left the government and began focusing solely on entertainment matters."

In October 2002, Bernie founded her own firm, B. Lawrence Watkins & Associates, PC; a boutique law firm that specializes in entertainment, corporate, and intellectual property matters. Using her expertise in the music and entertainment business, the firm focuses on representing clients and legal matters in the areas of music, trademark and copyright law, film and television rights, media technology, licensing and corporate transactions. Through her expertise and experience, Bernie has established a niche practice working with platinum selling producers and song writers including producers for Drake, Beyoncé, and 21 Savage. Her brother is also a successful music producer who has referred many successful clients her way. Bernie works diligently to continue to expand her practice by always striving for the best and networking and adds, "My goal is to always try to negotiate deals that can transform my clients' lives by putting them in a better position."

In addition to her professional accomplishments, Bernie is very active in her community and other charitable causes. In 2007, along with three of colleagues, Bernie co-founded "Gather for Good" - an annual networking and fundraising event that seeks to raise funds for local nonprofit organizations. Bernie also sits on the board of several nonprofit organizations, including:

- CHOICES: The Center Helping Obesity in Children End Successfully, Inc.
- SCDA: Sickle Cell Disease Association of America
- Georgia Music Partners
- Empower the Change

Bernie has also received numerous prestigious awards over the years including:

- 2012: *Entertainment Lawyer of the Year* by *Women of Wealth Magazine*
- Honored by ASCAP as one of the *Women Behind the Music*
- 2014: *Chairman's Award* from *Entertainments, Sports and Art Law Section* of the National Bar Association
- 2015: *Top 25 Women of Atlanta List*; *Rolling Out Magazine*
- 2018: *Rising in Community and Excellence Award*

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JONAS SEYPPEL

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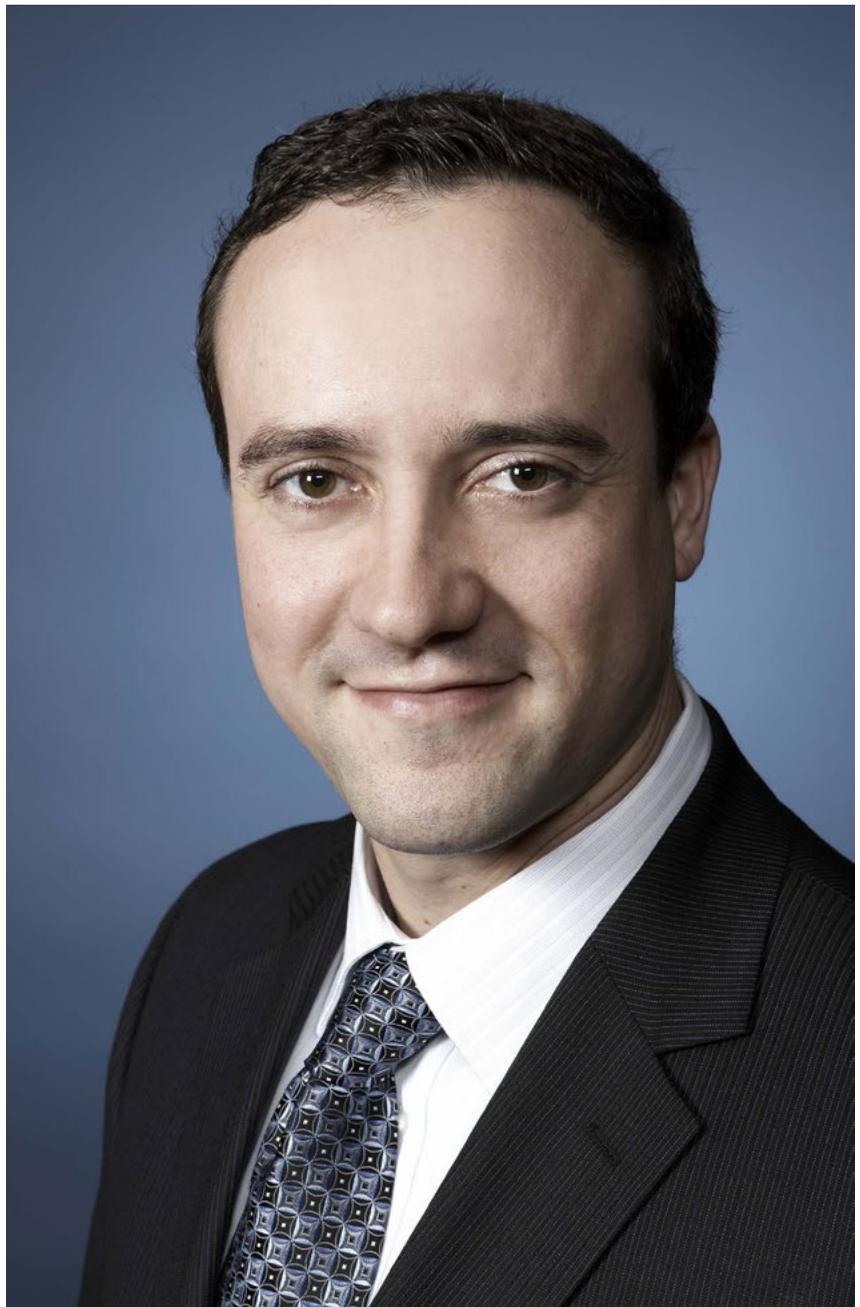
Jonas Seyppel is the founder and CEO of MÜHLHAUS COFFEE. As a kid, Jonas frequently traveled through the Balkans, Middle East and North Africa. He fondly remembers sitting in café houses in Vienna and Turkey, enjoying tea, treats, and coffee. That inspired him to create MÜHLHAUS COFFEE and modernize the Viennese Café experience.

MÜHLHAUS COFFEE is so unique because it is the only Viennese Specialty Coffee that is USDA Organic, comes in Portable Pour Overs and 100% Renewable Packaging. MÜHLHAUS COFFEE is for the Avid Coffee Drinkers, Busy Professionals, Travelers on Long Journeys and Outdoor Enthusiasts, and available on Amazon, grocery stores, and farmers markets.

Jonas is originally from Germany and graduated with a master's degree in political economy and Chinese studies from the University of Tübingen and Peking University. In 2006, he moved to the United States and attained his business degree from NYU.

Out of business school, Jonas joined GE as part of the prestigious Experienced Commercial Leadership Program (ECLP). He was promoted to Marketing Director at GE Power and GE Oil & Gas, as well as General Manager (marketing) of GE Digital.

During his 15 years with GE and the energy industry, Jonas led large-scale, global initiatives and 11 acquisitions and joint ventures. Jonas' corporate career highlights include the 2011-14 turnaround



of the GE gas turbine business in China, which included: 1. The introduction of a new gas turbine for Southern China; 2. The development of corporate and regional government partnerships in both Harbin and Nanjing. Through Jonas' analysis and response to changing trends in the 2011-20 gas turbine market, GE increased its Chinese market share from 15% to 35% in just three years.

Jonas has lived in Africa, the Middle East, (Morocco, Turkey), Asia (China, Thailand, Kirgizstan), and Europe (Germany, France, England, Macedonia) and speaks four languages; German, English, French, and Mandarin Chinese. He is a German Academic National Foundation (Studienstiftung) Honors Award recipient, and a certified Lean Six Sigma Black Belt. Jonas' hobbies include mountaineering and Kyokushin.



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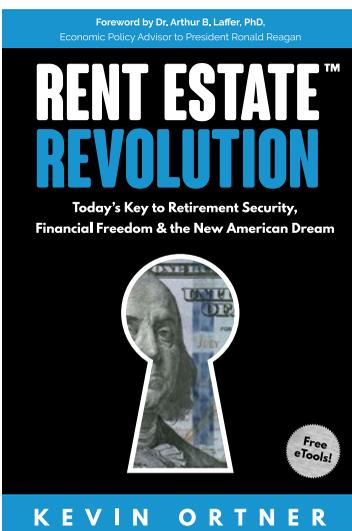
Mr. Ortner's exemplary leadership led Renters Warehouse to become a consecutive nine-time honoree of the prestigious Inc. 500/5000 list of fastest growing privately held companies in America. It has also been featured on countless media outlets such as *NBC*, *Good Morning America*, *CBS*, and *HGTV*. Mr. Ortner himself has been recognized with several awards and honors. He is a two-time honoree of the *American Stevie Business Awards* and also received the *Executive of the Year Award* in both 2015 and 2016, and an *International Stevie Business Award* for his achievements as CEO. Mr. Ortner attributes his success to his passion for helping everyday Americans like himself regain the lost American Dream of retirement security.

Mr. Ortner is active in a number of professional associations and serves as an advisory council board member for the Single Family Rental Association (SFRA) and as a governmental affairs committee member for the National Association of Residential Property Managers. Kevin is also a member of the National Rental Home Council. In 2017, Mr. Ortner published his first book, *Rent Estate Revolution*, through which he shares the Renters Warehouse philosophy and business expertise around single-family rentals and the power of real estate to drive long-term wealth creation, retirement security, and financial freedom for the everyday person.

Mr. Ortner received a bachelor's degree in aeronautical management technology, aviation, and business management from Arizona State University. The son of a police officer who also dabbled in construction, Mr. Ortner learned about real estate from the ground up, using that knowledge to acquire his first property at only eighteen. Mr. Ortner is a former corporate pilot, who enjoys his spare time by traveling, scuba diving, flying planes, and being with his wife and their two daughters.



Kevin Ortner is the president and chief executive officer of Renters Warehouse, one of the fastest growing and highest-reviewed residential property management companies in the U.S. Mr. Ortner first joined the company in 2009 as a franchise owner for the Phoenix region. In 2015 Mr. Ortner went on to take the reins of the company leading it to immense growth, fueled by his vision and strategy. Renters Warehouse now manages more than \$3 billion in residential real estate, servicing 14,000+ investors across 22,000 residential homes in 42 markets and more than 25 states. In 2015, Renters Warehouse officially trademarked the term Rent Estate™ to redefine the entire Single Family Rental (SFR) industry as real estate gives way to this increasingly lucrative asset.



MARC TRENT

As a prior business owner with extensive experience in the global import and export industry, as well as working as a consultant and senior vice president in the financial services industry, **Marc Trent** brings a wealth of diverse knowledge and experience to his current role as an attorney and partner at Trent Law Firm, P.C.

Marc is proud to partner with his father, Douglas P. Trent, a successful practicing attorney for over 45 years, at Trent Law Firm, a firm they founded together in January 2018. The Firm handles diverse cases and represents clients and businesses in the areas of business litigation, family law, personal injury, workers' compensation, and employment discrimination. Marc concentrates his practice on business litigation, including employment and labor law, as well as family law matters and personal injury cases. He litigates frequently, appearing in court on an average of two to three times per week. Marc, his father, and their team of highly competent and experienced attorneys at Trent Law Firm offer experience in litigation in all of the areas of the law that they focus on and represent.

Marc attributes his success as an attorney to the experience and complex knowledge that he gained in his careers as a business owner and as a financial consultant in the finance and insurance industry. Marc worked for over two years as the owner and operator of Bravo Motors, S.A.S., a subsidiary of Oxford Atlantic, LLC, the first American company in Colombia to import medium and heavy-duty remanufactured truck parts and diesel engines. In that role, Marc managed all logistics for importing and exporting merchandise between the United States and South America. He ran the entire business, negotiated purchase prices, managed employees, and handled all legal matters. He gained a wealth of experience in that role that he applies to his professional career in law today.

Working as an estate planning and financial consultant, Marc guided clients and trained brokers



and financial advisors on estate planning, buy-sell agreements, executive compensation, and key-person policies. He also led seminars for government and corporate officials on numerous topics including entity formation, corporate governance, financial analysis and expense management, asset protection strategies, medical firm management, and consulting methodologies. Marc's diverse professional background and advanced education have provided him with a broad and extensive foundation to practice law and represent clients successfully.

Marc received both a Bachelor of Arts degree in criminal justice and business studies as well as an MBA with a concentration in finance. He went on to earn his J.D. from Valparaiso University School of Law.

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created a comprehensive training manual, covering guidelines, compliance, sales and financing strategies – my focus with this program was teaching loan officers how to achieve long term career success.”

Brandon conveyed that the training program was a huge success because, “The goal was to develop a sales force that were skilled advisors, knowledgeable of lending programs and strategies along with the understanding how to run their own businesses.” Over the years, he trained over several hundred new employees. As a result of their focused and expert training, this population of new loan officers produced a high volume of sales.

In May 2018, Brandon transitioned into his new role as a senior loan officer at Strong Home Mortgage. Strong Home Mortgage offers customers competitively priced lending options and an easy and efficient lending experience. They have a team of highly experienced operational staff and loan officers that truly understand the guidelines and the entire lending process.

Brandon focuses on personalized mortgage planning. He offers his customers a positive lending experience and takes the time to help them understand the entire financial lending and decision-making processes. He also works closely with realtors to help them grow their businesses by creating positive lender/realtor relationship.

As a senior loan officer with Strong Home Mortgage, **Brandon Cobb** brings over twelve years of experience in the lending industry to his current role. With diversified experience in sales, marketing, management and corporate training, Brandon provides an in-depth understanding of the lending and finance industry to all of his clients.

Prior to joining Strong Home Mortgage, Brandon spent ten years as a senior loan officer at J.G. Wentworth, a financial services company. In addition to successfully managing that position, he also spent five years as a sales manager and corporate sales trainer. In that role, he successfully built and organized a training academy for new loan officers. As the sales trainer for the direct lending division of the business, Brandon used his experience to improve the performance of the sales department by helping existing and new loan officers to reach their full potential. In a typical year, he would train from 50 to 100 loan officers in the areas of both direct to consumer and retail lending.

He explained, “Some of our employees were fresh out of college, with no experience at all. I presented an in-depth and complete training program that covered every facet of the industry from A to Z. I also

In addition to his twelve years of hands-on lending experience, Brandon is a certified mortgage planning specialist (CMPS), a certified military housing specialist (CMHS) and a certified divorce lending professional (CDLP).

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BLUE PHOENIX
— VENTURES —

JEFF DILLMAN

Jeff Dillman has known what he wanted to do in life since he was a teenager.

“I was working for a contractor framing tract homes one summer, and saw the developer roll up to check in on each of the homes going up. He had taken a piece of dirt and envisioned a community in its place, taking it through entitlements, buildout, and eventually sales. From that moment on, that was the goal.”

With a background in architecture, CAD and drafting, and an engineering degree, Jeff had the opportunity to work on some of the most exciting projects in the United States, including the development of the Aria Resort and Casino in Las Vegas.

After landing in California and working with a major contractor and a project management firm, he branched off on his own, founding a construction company, but soon realized that while you may be able to build something, not much gets done without financing in place. He decided to go all in on finance, securing a position at an investment banking firm, which later led to roles within private equity, alternative debt/venture capital, and eventually business consulting, when he formed Blue Phoenix Ventures.

Today, Jeff splits his time between his consulting practice and the investment banking firm he works at. Between the two, he works side-by-side with client’s CEO’s and CFO’s to help facilitate the various engagements his clients need. Those projects have included helping the ownership sell their company, buying a strategic company to vertically integrate, putting various financing mechanisms in place to support growth strategies, developing institutional-ready business plans, creating in-depth financial models that incorporate strategic initiatives, developing go-to-market strategies, pitch decks, and creating corporate videos.

“The thing that’s been the most interesting to me over the last few years is getting to see these companies



in all kinds of different sectors and what makes them really tick. I get to sit down with the C-Level guys, get a data dump, and then dig into the operations and financials, helping solve both real-time and future issues for the company. It’s a lot of critical thinking and problem solving, which makes every day interesting.”

Mr. Dillman has an MBA from Chapman University, an engineering degree from Kansas State University, is an active investment banker holding FINRA licenses 7, 66, and 79, has previously held California real estate brokers and general contractors’ licenses and has worked on nearly \$10B worth of real estate projects and another \$100M+ in business mergers, acquisitions, financings and capital raises.

Whether it’s working with a startup, an established company, one that’s about to IPO, or even up to Fortune 500 companies, each client is treated as a priority.

“We look at things from a long-term perspective. If we can help out a business owner today, chances are they’ll continue to work with us over the years as other issues they may need assistance on arise. Helping grow those companies and seeing ownership and management thrive is a great feeling.”

For help with mergers & acquisitions, real estate projects, financial modeling, business plan/pitch deck creation, marketing or other business and management consulting, Mr. Dillman can be reached at:

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Shiraz Madan is the chief executive officer at Sustainable Capital Finance (SCF), a highly successful solar finance company that he co-founded in 2012. Prior to establishing SCF, Shiraz worked in the commercial banking industry and presided over an SEO and internet marketing startup.

After graduating from Millikin University in Illinois with a BA in business management, Shiraz began his career at La Salle Bank/ABM AMRO in Chicago, working as a credit analyst and commercial banker for large corporate clients. In 2007, Shiraz left the banking industry and joined the internet marketing startup, SEO Design Solutions, as a vice president. There he managed investor relations, business development, and strategic marketing partnerships. He was eventually promoted to chief executive officer, where he strategically and successfully grew the business.

In 2012, Shiraz decided to rejoin the financial services industry; using experience and expertise gained from his previous two stops, he partnered with Dan Holloway and DV Patel to found Sustainable Capital Finance, a successful solar finance company. As the current CEO of SCF, Shiraz serves as the primary communicator, decision maker, leader and manager of the business. Shiraz explains that SCF has continued to grow and become successful due to innovative financing solutions offered to clients in underserved solar & storage markets.

Shiraz credits his personal success and the success of his business to the motto, “Lead through service; serve your employees, customers, and industry in a way that betters individuals and the planet.”

In addition to his inclusion in *40 Under 40*, Shiraz was recognized as the 2019 *Best Financial Services CEO in Northern California* from *US Business News* and in 2018, as one of the *Top Ten CEOs in Finance* from the *FiNext Awards Conference*.



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Sustainable Capital Finance is a third-party financier and owner/operator of commercial and industrial solar assets and is comprised of experts that specialize in structured finance and solar development. The business provides power purchase agreements to commercial, industrial and non-profit energy consumers, with solutions for projects as small as a 100k to both rated and unrated customers. SCF is focused on helping the US inch closer to 100% sustainable energy production.



DV Patel brings his unique skills and experience to his role as the director of operations at Sustainable Capital Finance. His in-depth knowledge of mergers and acquisitions, asset management, software development, project management and financial analysis all contribute to his professional success and the success of his company.

Sustainable Capital Finance (SCF) is a renowned financial services company that works directly with solar integrators and energy consumers to provide takeout and third party financing for commercial, municipal, and non-profit projects. As the director of operations for SCF, DV manages daily operations, while analyzing and improving processes throughout the business. DV played an integral part in the development and launch of the SCF SuiteSM. The SCF Suite is a business to business software platform, created to assist solar project developers and installers evaluate commercial-scale solar generation projects and portfolios in the U.S.

DV received a BS in finance from Butler University and he began his career working for his family enterprise, which included business and real estate acquisitions and investments in technology and business startups. He gained hands-on experience, maintaining many of the business initiatives, as well as through owning and managing operations for several lines of assets and businesses. DV also developed a background in the wealth management industry, working in the financial sector for Merrill Lynch. In that role, he witnessed the market crash of 2008 and gained insight into how to develop new portfolios and investments for clients in a time of financial adversity. DV adds, “I gained a deep understanding of investment risk tolerance by uniquely analyzing and building each portfolio for each investor.”

DV later joined SEO Design Solutions, an internet marketing startup, as an account manager. In that role, he managed over ten employees, cultivated all client campaigns and built new processes that improved efficiency. He was also responsible for developing cost saving strategies, making long term operating recommendations and implementing quality assurance methods for new products. When Shiraz Madan, the CEO of that company decided to rejoin the financial industry, he invited DV to join him at SCF - and the rest is history. In addition to his professional accomplishments, DV is a scotch aficionado, an exemplary cook, and a die-hard Philadelphia Eagles fan.”



A trusted reputation is the key to success in any business, as demonstrated by Koorosh Farzad, founder and owner of Masihi Financial Group, a leading mortgage origination and investment management firm headquartered in Los Angeles, California. Koorosh learned this firsthand from his father, a prominent real estate and mortgage broker with Re/Max for over thirty-years.

While enrolled in law school, Koorosh's father fell ill. To assist and support his family, he withdrew from the program, transitioning to the mortgage industry; first as a loan officer, working alongside a family friend mortgage broker. After two short years, Koorosh applied for and received his brokerage license and opening his own practice. Today, his impressive portfolio of loan transactions includes a \$7.2 million dollar deal he recently closed in Bel Air. In 2018, Masihi Financial Group reached over \$25 million dollars in closings per home valuations and is on track to surpass that figure in 2019.

Expanding upon his father's legacy, Koorosh leveraged existing connections with mortgage banks and focused on developing the quality, not the quantity of his client relationships. With their unique situations and needs in mind, Koorosh and his staff begin with a comprehensive analysis of their client's finances in order to match them with a lender and loan program to accommodate their budget, time horizon, and long-term ownership goals.

Koorosh and his team also assist buyers with challenging financing needs, self-employed borrowers with multiple businesses, and those with clients with complex forms of high income, helping them to acquire properties in the multi-million-dollar range. Additionally, Masihi Financial Group works with families preparing to budget for a purchase up the road, aiding them in acquiring the savings necessary to become homeowners.



Koorosh Farzad, Founder and Owner of Masihi Financial Group

Refinancing is another service Koorosh's company offers. After targeting the ideal type of loan, his team examines which benefits will best serve their client's current and future needs.

Masihi Financial Group value the clientele they attract, because growing the brokerage into a highly reputable company is more important than any single transaction. Accepting complete accountability will generate long standing relationships with everyone they come across.

A personalized, highly professional style contributes to Koorosh's success as a second-generation mortgage broker, as it helps to alleviate any of the common fears homeowners experience throughout the lending process.





never been done before. With only 1 year of sobriety under her belt, her mother, who had never given up hope, agreed to help purchase Barb's first recovery home.

Initially, Barb struggled with being taken seriously in the Industry due to her young age and length of sobriety. Finally, a local treatment center, The Livengrin Foundation, believed in her vision and took a chance on working with Way of Life Recovery.

With the success of one home, Barb was eager to expand, and needed financial capital outside of her family. She approached a complete stranger, Jim Worthington, the owner of Newtown Athletic Club. After hearing her inspirational story, vision, and dedication to help others, Mr. Worthington wrote her a check to help fund her dream. This was the ticket that Barb needed to set her vision on fire, and that is exactly what she did.

Barb now owns and operates 15 sober living homes that provide personalized treatment plans, certified 24-hour staff with access to social workers, therapists, family programs, financial guidance, gym memberships, massage therapy, and social events to help residents form meaningful relationships amongst each other. Way of Life Recovery is now a nationally known organization and has worked with treatment centers globally.



With the opiate epidemic skyrocketing in our country, Barb felt like she needed to do more. She shifted her attention to opening intensive outpatient facilities for adolescent and young adults. After a meeting with Dr. Huma Mahmood, an award-winning, double-board-certified psychiatrist, Barb knew she found the right doctor to grow with.



With an amazing, all-woman team, Supreme Wellness treatment facility was created with a shared vision to provide the most innovated care to individuals in recovery. Currently, Supreme Wellness has 3 locations and is on the verge of opening a therapeutic day facility.

Barb's incredible journey, coupled with her passion for giving back to her community, shows that recovery is possible and she remains on the front lines to help others through the battle for sobriety.



Barbara "Barb" Williamson is the founder and president of Way of Life Recovery, a network of sober living homes, located throughout the Bucks Montgomery and Delaware county regions of Pennsylvania.

Barb is both a member of and advocate for the recovery community. As a teenager, she began using drugs and was addicted to heroin before the age of seventeen. She was in and out of multiple treatment centers and ended up homeless for a period of time. After a long struggle and the willingness to try something different, Barb found herself in a recovery home. This experience opened her eyes and motivated her to help as many young adults who struggle with addiction.

At 24 years old, Barb had a dream to open houses of her own, wanting to offer luxury living, while focusing on a high level of individual care at a reasonable cost, which has



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COLIN P. BEHRING

As the third generation in a line of successful real estate developers and investors, Colin Behring has made his own mark as a savvy global real estate developer and financier. Today, Behring operates a future-focused global real estate development, private equity and EB-5 investment platform, referred to as Behring Companies, based in San Ramon in the San Francisco Bay Area.

Behring's operation consists of three major components, including real estate development, private equity fund management and EB-5 investment. Behring's dynamic approach was cultivated through a 60-year family history in development and investment in the U.S. and China. This forged his current investment focus on transit oriented, urban-infill multifamily apartments and high-rise buildings.

Six days after graduating with a degree in business administration and management (finance) from Cal Poly (SLO) in 2006, Colin's debut began at the bottom as an intern analyst for Morgan Stanley Properties (MSREF) in Shanghai, China, which he refers to as the "unofficial headquarters of high-density urban living." That humble start, working on a multi-billion portfolio of China's most high-profile real estate developments, positioned him perfectly for his current real estate ambitions.

In 2008, as the only family member fluent in Mandarin Chinese, Colin joined his grandfather, Kenneth E. Behring, at Behring Group to begin work on a flagship 360-acre, 1,000 unit, mixed-use master planned residential community off the coast of Shanghai with an estimated value in excess of \$2 Billion. Following on that success in China, 2013 brought Colin new opportunities through a combination of depressed U.S. property valuations and the rise of emerging market interest in U.S. investment. Colin moved to assemble an investment platform focused on outbound investment from the Asia Pacific region to the United States into multifamily apartments.

As the chief executive officer, Colin has skillfully guided the Behring Companies from its inception in 2013, to amassing an operation that is currently invested or financing over \$600 million in real estate developments. His Shanghai experience shortened the learning curve in deploying new innovative strategies in the Bay Area. They are one of the few developers in California that have the experience and unique skillset to plan, design and build efficient high-rise communities. Remaining future focused, Behring has improved upon traditional urban design concepts by embracing unique operating



models such as co-living, co-working, and tech-enhanced services specifically catering to a successful and highly efficient urban lifestyle. Colin explains: "In urban areas, housing commands so much of your personal resources – our company is unlocking value by providing a way to do it easier, cheaper and better."

Behring Companies is currently focused on its next flagship project located at 1900 Broadway in Oakland, California, and Colin adds that "it is a perfect example of where housing should be going: a 39-story tower offering a walkable and carless lifestyle with all the desired amenities to live, work and play in the same place." Our platform's ability to first develop, finance and then operate these communities is how maximum value is achieved. Behring explains: "Most developers get stuck at one phase or another. Our unique platform reduces the effort and cost at each stage, and investors ultimately benefit from these efficiencies and from higher caliber investment overall". Staying ahead of every trend and getting maximum value out of each property is surely what sets the Behring Companies apart from its competitors.



Colin P. Behring - Chief Executive Officer - Behring Companies
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Tasvir "Tas" Hasan is the founder and owner of TasHas1037, LLC, a New York based company that specializes in real estate investing, career coaching/training, and other advisory services. Tas established the company in 2017 and has led its strategic direction and overall vision. He advises clients on real estate market trends, investing, commercial and residential properties, and Real Estate Investment Trusts (REITs).

Tas was inspired to start his business and also become involved in REITs after attending workshops, conferences, and entrepreneur driven classes held by visionary leaders such as Daymond John (from FUBU, *Shark Tank* etc), David Lindahl (author and real estate investor), Emmitt Smith (*Hall of Fame* football player, and real estate investor), and Matthew Perry (owner of a REIT, where Tas is a member/investor).

Tas is also an executive director at JPMorgan Chase and group head of the North American Multinational Credit Risk Team, covering the subsidiaries of European, Asian, and Latin American Multinational Corporate clients (MNCs). "Clients come to us when they need loans or other products and services that have credit exposure," he elaborates.

Tas has worked at JPMorgan for eighteen years, including four years as a *Smart Scholarship/Internship* participant. He graduated high school with an engineering degree and in addition to being *Salutatorian* of the school and *Engineering Program*, he was editor of the yearbook and captain of the handball team that won the *City Championship* that year.

Tas interned at JPMorgan all through college and graduated from Baruch in 2004 with a Bachelor of Business Administration degree in accounting. Most of his career at JPMorgan has been in credit risk, where he started as an intern and stayed for over 14 years. He enjoys working on thought-provoking and valuable projects. Most importantly, Tas enjoys working with smart and humble people.

Well respected by colleagues for his dedication, knowledge, exemplary leadership, and ambition, Tas attributes his success to mentors, current and former managers, diligence, solid time management, communication, and analytical skills, and being a good team player. He has also stayed with the Company due to the leadership chain, including all the way up to the CEO, Jamie Dimon, who has been a long standing inspiration for him.

Attentive to altruistic endeavors, Tas maintains an active profile in the local community and supports the National Association of American Veterans, the New York police and fire departments, and the American Cancer Society, amongst other charitable organizations. He also volunteers at church, helping with security, children's classes, and food drives. In his spare time, Tas enjoys being with his wife and their two daughters, as well as staying active by practicing Strong Man Weightlifting, Muay Thai, and Brazilian Jiu-jitsu, at his local gym, KingsOfCombat.

Tas has appeared in *The Top 100 People in Finance Magazine* in 2019 as well as *The Top 100 People in Real Estate Magazine* in 2018.

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Ivan Vucetic is a co-founder and the head of business development at VIR Construction, one of the premier construction companies in New York servicing both residential and commercial clients.

VIR Construction specializes in single-family homes and commercial spaces such as restaurants, private clubs and medical spaces. They have also recently opened a custom mill workshop located in Jersey City. Ivan and his brother, Tom, established the business in 2014 after gaining invaluable experience from their father and grandfather. “I believe that our passion for building was embedded in us as children,” said Ivan. My brother and I both spent summers in Croatia as children learning how to build homes with our grandfather. We have been bred to perfect every detail and exceed customer expectation. My father, Peter, opened VIR Builders in 1993. My brother and I worked with our father on the weekends and summers while we were in high school. After we finished college, we were on board full time.

In 2014, Tom and I left VIR Builders to start VIR Construction and have since achieved immense success.” Ivan offers practical advice to anyone starting out in the industry. “Be consistent in your best practices and you will yield the greatest results. Developing strong client relationships is so important. We become friends with the majority of our clients and our repeat business is very high. When people start referring you

because they are confident in your ability and you don’t need to rely on advertising, that’s when you know you’ve made it.”

Well respected for his skill and ambition, Ivan attributes his success to mentors such as his grandfather, father, uncle, and Michael Axelrod, the founder of French Connection, who taught him about the importance of attention to detail, hard work, and efficiency.

Ivan holds a degree in project management from Hofstra University. He has also studied Green-building solutions and is lead painted certified by the EPA. Away from his business, Ivan maintains an active profile in the local community and supports organizations that benefit children with developmental disabilities. In his spare time, he enjoys meditating, playing basketball, lifting weights, traveling, and being with his wife, Jennifer, and their daughter, Olive.



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Dr. Kausar is dually trained and board certified in emergency medicine and internal medicine. Dr. Kausar double majored with distinction from University of Maryland Baltimore County with a Bachelor of Science degree in biology and a Bachelor of Arts degree in psychology. Dr. Kausar obtained a Medical Doctorate from Virginia Medical School and completed a competitive combined five-year residency in internal medicine and emergency medicine at Thomas Jefferson University Hospital Northeast in Philadelphia.

Dr. Kausar has extensive research and training experience from the National Institute of Health, where she studied the effects of a folate deficient diet on the cell cycle and its direct impact on the incidence of Alzheimer and Parkinson disease. Dr. Kausar further trained at the Johns Hopkins University School of Medicine, where she helped identify serum-based biomarkers by working with patients with biliary and pancreatic cancer so as to improve the diagnoses and prognostication of these deadly diseases. Dr. Kausar also conducted research on the effectiveness of DHA on pigmentation, vision capabilities, and neural development at the The National Center of Marine Biotechnology Baltimore, Maryland.

Dr. Kausar spent a significant amount of time volunteering in the underserved villages of Guatemala and Honduras, where she gained first hand experience and learned about health issues typical to population living in underdeveloped conditions. This experience opened her eyes to the diversity of health care and fueled her compassion to provide quality care for patients in need and with limited resources.

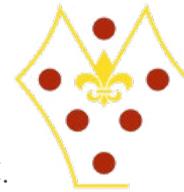
Dr. Kausar has been the recipient of numerous prestigious awards and accolades during her career. She has been previously featured as one of the *Top 100 Doctors* in the *Top 100 Magazine*. Vitals.com has awarded her with the *Patient's Choice Award* and *Compassionate Doctor Recognition Award*. The American Health Council has also selected her as a *Leader in Medicine* and among the *Best Doctors*. The United States Achievement Academy honored her with an *Academic All-American Scholars Award*. She was also incorporated in *The National Dean's List Dignitas* for demonstrated excellence in academic achievement.

Dr. Kausar is an avid contributor of her medical expertise on *Fox TV* and has had several guest appearances on various television and radio broadcast stations. Dr. Kausar is an enthusiastic world traveler and has traveled to more than forty countries. She believes that travel is fatal to prejudice and bigotry. Dr. Kausar thrives to follow the values of her upbringing instilled by her parents- Do right. Do your best. Treat others as you want to be treated.

You can follow Dr. Kausar on Facebook at: <https://m.facebook.com/humakausar0?tsid=0.5413819908914482&source=result>

Camila P. Medici

PRESIDENT, MEDICI LAW, P.C.



Camila Medici always knew that she wanted to become an attorney. Throughout her life she could not contain the urge to fight for justice where she felt it was needed. As an immigrant to the United States, she was never afraid of challenge and overcame many obstacles to achieve success, including learning a new language, graduating from college, attending law school on several scholarships, and becoming an accomplished attorney who founded her own law firm, Medici Law P.C.

Camila was born and raised in Rio de Janeiro, Brazil, and migrated to the United States in 1996, speaking no English at all. Today, she is fluent in five languages: Portuguese, Spanish, Italian, French, and English. After graduating from the University of Maryland with a B.A. in criminal justice, she continued her quest to study law and received her J.D. from Hofstra University School of Law.

After finishing law school and passing the *N.Y. State Bar Exam* on her first try, Camila began working as a Workers' Compensation lawyer. This she explains, "Turned out to be the perfect fit because it was a field that needed someone like me, who cared deeply about people, and provided them with compassion, understanding, and hope. Injured workers are going through one of the hardest times in their lives financially, physically, and emotionally and they need personalized attention." She focused diligently on this industry and was hired by Schwartzapfel Lawyers to develop their Workers' Compensation department.

"I drafted every document, developed the workflow software, handled most of the networking and represented all their comp clients, mostly Union workers." It was at that point in her career that Camila realized that she had the personality and in-depth experience to start her own firm.

In 2011, Camila founded Medici Law P.C., a boutique law firm that focuses on Workers'



Compensation cases. The firm is responsive to all of their clients' needs and offers highly personalized service. She is also proud to have the first Results-Only Work Environment (ROWE) law firm in the country. Through the use of technology, most of her team can work 100% remotely and still interface with clients, collaborate internally, and provide stellar service.

While law is her passion and her practice, Camila is also a dedicated life coach and founding mother of her coaching company, High Vibe

Advocate. As a life coach, she uses the skills that she developed as an attorney, including an in-depth understanding of human struggles, to inspire people and guide them into remembering who they are and what their life purpose is.

"I consider myself a positive mirror, reflecting back to people their best qualities, and helping them realize that the tools they need to succeed are already inside them. My goal is to help people fall in love with their lives, and to raise the world's vibration one soul at a time."

You can listen to Camila's motivational talks every Wednesday on her podcast channel, *High Vibe Advocate*.
www.Highvibeadvocate.com



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Sarah prides herself on providing unrivaled, 5-star service. Here's what her clients are saying:

TESTIMONIALS:

"Sarah has a proven track record of delivering quality service. I have witness her commitment to deliver as promised regardless of time or day. She is the kind of person you want on your team. A true leader and a great friend. I look forward to our continued success."

"Absolute Best in the Business! Sarah and her team are thorough, proactive and truly understand customer service. Very professional and a pleasure to partner with!"

Sarah goes above and beyond to support her real estate partners and clients. She's even helped co-host open houses. There's never a moment she isn't smiling and being kind to everyone around, which is really vital in this industry. Her expertise, experience, attitude, and drive to help others succeed is what makes her "your title gal!" Give her an opportunity to do title for your next transaction!



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Sarah Caviggia is a business development manager for Tiago National Title, an attorney-owned title insurer of residential and commercial real estate and provider of search and settlement services nationwide.

Sarah accepted her appointment in 2018, following a role as vice president of sales and marketing for OIG Title & Escrow. Prior to working in the title industry, she worked as a real estate agent, sales consultant, and benefits coordinator. This wealth of diverse experience is put to good use in her present role, where her responsibilities are both varied and complex.

As a business development manager, Sarah is primarily responsible for client acquisition and retention initiatives. In addition, as a licensed real estate agent, she is able to network with brokers, financial institutions, foreclosure attorneys, servicing providers, and realtors to further expand the company's reach and standard of service.

Sarah holds numerous certifications and designations including several in insurance; *Florida Life* (including variable annuity and health) and *PA Accident, Health, Life and Fixed Annuities*, three in real estate; *RCS-D Real Estate Collaboration*, *RESE Professional Staging*, and a *Florida Real Estate License*, one in law; *Employment Law 101*, and one as a *Florida State Notary Public*. She has also received impressive accolades such as the *Highest Producer in Volume Award*.

In complement of her professional obligations, Sarah maintains an active role in associations that benefit others in her industry through the Carrollwood Area Business Association, the Woman's Council of Realtors, Working Women of Tampa Bay, and Greater Tampa Realtors. She is also especially active within the community by volunteering for the Lowery Park Zoo, Veteran Wheel Chair Games, the Clothing and Homegoods Drive, the March of Dimes, G.A.L. PAL, and West Chase Charitable Foundation, which endowed her with a Tampa Bay Woman of the Year Award.

While hard work, determination, and passion certainly played a significant role in her success, Sarah credits her achievement to the support of her family and mentors. She has four brothers, Bob, John, Daniel, and Nathan; four sisters, Heather, Bonnie, Alexandra, and Emily; and two sons, Chase, 11, and Jaxon, 6. Her parents, Robert and Pamela, have been married for 56 years. Sarah's mentor, Michael Kaprove, a retired independent title consultant, inspired her to pursue a career in the title industry.

When she is not tending to her work commitments or volunteering, Sarah enjoys her spare time by traveling, fishing, hiking, and camping. She has two dogs, a Shiba Inu and a Papillon, that she also loves spending time with.

ADAM HARTIG

Vice President of Real Estate

Lucky's Market

Adam Hartig, the vice president of real estate for Lucky's Market ("Lucky's"), is primarily tasked with expanding the grocer by identifying and securing potential new sites. Lucky's, a grocery store concept based out of Boulder, Colorado, specializes in many things, over and above organic, healthy food such as their famous, smoked-in-house bacon and their *Sip and Stroll Program*, which allows customers to enjoy a glass of wine/beer while perusing the aisles.

Founded in 2003 by two chefs, Bo and Trish Sharon, the company created a "strategic partnership" with Kroger in 2016 and has been steadily adding stores to the brand ever since. Those not familiar with Lucky's (located in 13 states), can view the store as a hybrid between a higher-end grocer, such as Whole Foods, and a concept that is heavily focused on produce, bulk, food service, and ready-to-eat products, similar to a Trader Joes. This proprietary blend of services results in a fun-loving, shopping experience, unique to the Lucky's brand.

Adam joined the staff of Lucky's in 2016, following a successful real estate career that encompassed roles as a leasing agent, developer, and broker. His foundation in the financial sector is especially relevant to his current role, which entails the overall management of anything that is related to the acquisition, negotiation, and development of properties for Lucky's stores.

As a seasoned real estate veteran, with a particular focus on commercial properties, Adam's skillset is the culmination of both education and practical experience. After his initial two years of college, studying business, while competing on the baseball team at Culver Stockton College, he transferred and pursued a business management degree at the University of Missouri, Columbia. Having a natural proclivity for math and knowing that commercial real estate was predicated on an aptitude for numbers, the transition into real estate was only natural. After graduating cum laude, with a BS in business administration, Adam accepted his first position in real estate, as a commercial leasing agent for The Kroenke Group. In this role, he was responsible for leasing properties throughout the country and eventually managing new ground-up developments, alongside renovations of existing properties. After



almost a decade with Kroenke, Adam segued into real estate sales with Maly Commercial Realty before starting his own company, Bright Light Realty, in 2016.

Recognizing that the downtown Columbia area was in need of a specific retail component and primed for regeneration, Adam procured a tenant who would greatly benefit by occupying a long time vacant building controlled by The Kroenke Group. This tenant was Lucky's Market. Although he represented the landlord in this transaction, Lucky's was so pleased with the outcome and experience of the mutually beneficial lease, that they asked Adam to become their broker to locate additional sites for their new stores. This opportunity is seen as the current highlight of his career, as Adam is now employed by, and committed to, working exclusively for Lucky's.

Adam maintains an active profile within the industry through membership in the International Council of Shopping Centers (ICSC). He is equally committed to his community and has supported several nonprofit groups and been involved with various charitable efforts. When he is not engaged with professional obligations, Adam likes to play golf and tennis, watch sports, and spend time outdoors, especially gardening/working in his yard. As a dedicated father to a newborn daughter, he also enjoys spending time with his family.

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Matthew Mesick is an entrepreneur, real estate developer, public speaker, and co-founder and CFO of Park Place Property Group—a firm that specializes in residential redevelopment, purchasing, renovating, and flipping single-family homes on the Northwest side of Chicago.

Mesick focuses on the day-to-day operations of the business, including identifying new acquisitions and raising capital to fund all aspects of the business. He is also a partner in a construction company, Compass Creations, which does all the construction for Park Place as well as on other Chicagoland investors who need reliable and communicative contractors that get projects done on time and within budget.

A licensed real estate broker in Illinois, Mesick is also a partner in a real estate brokerage, Cobblestone Realty, which gives their agents leads from the efforts of Park Place's marketing, and also allows their agents to give cash offers to homeowners to feed the acquisitions side of Park Place. Cobblestone has a great complementary investor-brokerage hybrid business model, has great splits, and is very technology-driven.

Mesick was working as an accountant when, after reading, Rich Dad Poor Dad, he decided to pursue real estate investing. What began as a part-time venture in 2012, quickly morphed into something more. Self-educated, he spent his time reading, listening to podcasts, attending investment boot camps and seminars, and networking; all of which further sparked his desire to become a real estate developer. He soon quit his 9-to-5 job and, after closing his first two deals, launched Park Place Property Group.

Mesick's focus is on quality, which is why he handpicks the best realtors, contractors, architects, and attorneys in the industry to partner with. He is also committed to rehabbing each home, so it becomes the nicest in the neighborhood. This includes using top-quality materials and finishes that are on trend and make a house feel like home. Mesick credits his success to hard work and confidence, which he maintains even through the trials and tribulations that all business owners face. A genuine people person, he enjoys inspiring others and sharing his financial expertise with aspiring entrepreneurs. He co-hosts the weekly podcast, *Profits Over Wages* (*profitoverwages.com*), which interviews highly successful business owners and entrepreneurs,

detailing their challenges and achievements. The podcast is meant to inspire listeners to break away from the 9-to-5 to start their own businesses as well as to encourage struggling business owners not to give up; struggle is just part of the process.

Mesick also hosts monthly networking events around Chicago, including cashflow game nights, fix-and-flip bus tours, and financial literacy roundtable discussions. Currently, he is developing an online course and coaching program aimed at teaching others how to raise capital for real estate transactions to replicate his success. In the last four years alone, he has raised more than \$10 million to fund his real estate deals. He recently launched a mentorship program as well to teach others how to fix and flip houses in the Chicagoland area.

Lastly, Mesick also launched Boardwalk Capital, which provides a variety of funding for investors including hard money loans for fix and flips, landlord loans, business lines of credit, and even joint ventures.

Mesick earned a Bachelor of Science degree in accounting from DePaul University. As a student, he received a \$20,000 *Centennial Scholarship* and a \$10,000 *National Hispanic Institute Scholarship*. In his spare time, Mesick enjoys boating on Lake Michigan and attending summer street festivals.



Xingang Wang

With his impressive education, successful career in accounting and finance, and admirable list of volunteer accomplishments and involvement in public service, it is no surprise that **Xingang Wang** is passionate about everything that he does.

Xingang was born and raised in China and attended Beijing Jiaotong University, receiving a Bachelor of Engineering (BENG) degree in transportation management engineering. After college, he relocated to England and continued his education at the Imperial College London, obtaining a Master of Science degree (MSc) in transport. While pursuing his degree in London, Xingang worked as a consultant for Atkins, one of the world's most respected design, engineering and project management organizations.

He then shifted his focus from engineering to finance and received a master's degree in mathematical finance from the University of Oxford. While pursuing his additional graduate studies and education, Xingang began his professional career in finance working for several major and world renowned financial organizations including JP Morgan, Wells Fargo, Barclays Bank and Scotiabank, where he held several management positions. In 2015, Xingang also graduated from the Program for Leadership Development (an executive MBA alternative program) at Harvard Business School. He is also a director of a property investment firm.

Xingang currently works as a subject matter expert in product control function in the investment banking industry, where he analyzes complex financial products from a mathematical and accounting perspective. He explains that his primary responsibilities include profit and loss attribution analysis and independent price validation; both key internal control functions in modern finance.

Xingang is also very involved in his community and politics. His goal is to set a positive example to local families and community members. He served as a local councilor for the Claygate Parish Council, where he is vice chairman of the council, a member of the Leadership and Management Committee for the Hinchley Wood Primary School, a magistrate for the HM Courts & Tribunals Service, a trustee for the Chinese Welfare Trust organization, and is a career mentor for recent business school graduates from Oxford University.

Xingang is a published author of several books and work papers including:

- Book: *How to Become A Product Controller*; published in 2014
- Discussion Working Paper: *Optimal Timing of IPO: Preliminary Evidence from Alternative Investment Market*, European Financial Management Association Annual Conference, Netherlands, 2015
- Book: *How to Enter Top UK Universities* - published in 2004
- Paper: *The Design of Intelligent Operation and Surveillance System*, 4th Annual Conference of Communication & Transportation Systems Engineering, China, 2000



Xingang was also the recipient of several prestigious awards for both his professional and political work including:

- UK and European *Outstanding Persons Award*
- *Big Ben Award*, 2016
- *Best of Best Award*, Scotiabank, 2014
- *Wholesale Operation Award*, Wachovia, 2007

Xingang's motto is "work hard, play hard" and he follows the teachings of the philosopher, Confucius, who preached, "Self-cultivation, a well-managed family, and bringing justice and harmony to the world." He lives in the United Kingdom with his wife and children.

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Whether they are investing in properties, remodeling and selling homes, brokering the best deals in real estate or following their favorite bands and attending concerts, **Emily and Jimmy Connolly** are passionate about everything they do in both their professional and personal lives.

Emily and Jimmy are the founders and owners of Twice As Nice Properties, Inc. - a residential redevelopment company based in Chicago, Illinois. They founded the company in 2015 and have successfully turned it into a renowned and highly recommended business in the Chicago area. Emily explains that flipping houses was always something they were interested in doing. She and Jimmy completed advanced real estate education courses to learn more about the wholesale, rehabilitation and investment areas of the business and they began partnering with experienced people in the industry - and eventually invested in their own projects.

Together, they have over twenty-five years of combined real estate investing experience and offer all of their clients - honest, personalized and reliable services. They manage a highly experienced team of real estate specialists with a proven track record of success in property sales and leasing. As business owners, they successfully manage and lead their team in every aspect of the business including property acquisitions, design coordination, overseeing rehab construction projects and creating and managing all marketing efforts. They love to network and collaborate with members of the community and every month they host a popular networking event called, "Real Estate and Cocktails" which is hosted at different establishments throughout the Chicago area.

Emily has been a licensed real estate broker since 2005 and has worked for several brokerage firms. In addition to running her business, Emily is also an experienced broker with EXIT Strategy Realty, where she uses her real estate expertise to work closely with buyers, sellers and investors throughout the Chicago area. She is also a member of National Association of Realtors, Illinois Association of Realtors, and Chicago Association of Realtors.

Beyond his successful real estate career, Jimmy has also worked for the Chicago Fire Department as a senior air mask technician for the past 23 years. In this quality assurance role he ensures that all the equipment used by the fire department is in proper working order and meets all manufacturers' requirements.

In addition to their professional passions, Emily and Jimmy are huge music fans and enjoy following the band, Phish, and working at all the major music festivals in Chicago. They also enjoy spending time with their three English bulldogs.



Emily and Jimmy Connolly
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Jake Stenziano

Principal, Rand Partners LLC

What exactly do you do? I understand that you invest, manage, and educate in the apartment space but what do you do?

I serve as principal of Rand Partners LLC—Multifamily Syndication, Rand Property Management LLC, Jake and Gino LLC—Multifamily Education and 14 additional holding companies. Managing the day-to-day business operations of each company, my responsibilities include facilitating large-scale purchases, closing apartment deals and overseeing financing. I also lead the strategic direction of our businesses. This year, I am also launching a brokerage firm and a charitable organization called Rand Cares.

What are your responsibilities as the business owner and what does your company offer?

I manage the investment side of the business and the company/employee side of the business. At the end of the day, we purchase and reposition apartment complexes. My top focus is creating a great resident experience. The second focus is on our employees. I strive to create an amazing work culture, where employees are honored and have opportunities for growth. I am always looking to add great people to our team.

What is unique about your business and what are your company goals?

We are vertically integrated. What that means is that we control the entire process from identifying the deals, making sure the numbers work, closing and managing the investment, and also completing the property management work. To summarize, our family of companies includes asset management, syndication, property management, multifamily education, and holding companies. As mentioned earlier, we are also adding a brokerage business as we speak. Our short-term goals are to hit \$100 million in assets under management and then grow to \$1 billion AUM.

To what do you attribute your success?

Hard work, persistence, and a ton of energy. I truly believe that I was blessed with an unusual amount of energy and it has helped us launch many of our businesses. The initial thrust in launching a business is always the most difficult and that's when you need to have the energy to stay in the game. It can be very challenging at times. The best thing we did early on was that we didn't quit. We received a ton of rejection from brokers and banks but we hung in there just long enough.

If you had one piece of advice to someone starting out, what would it be?

Persistence; multifamily investing is not rocket science but it's also not for everyone. Try to be self-aware and find out what you're going to get the most enjoyment from.

Tell us about your education company

This is all contained in our book, *Wheelbarrow Profits*. We created a framework based on our experience and realized that each successful deal had three legs, which are: buy right, manage right, and finance right. If you can properly manage each of these legs, your investment has a great probability of success.



Outside of your business are you active in any nonprofits or charities?

This year we are launching Rand Cares - a charitable organization to help feed hungry children.

What business related book has inspired you the most?

Atlas Shrugged, the book taught me objectivism, which promotes virtues such as independent thinking, productiveness, justice, honesty, and self-responsibility.

In regards to your business, what are you most excited about?

I would say, the growth of Rand Partners. Prior to Rand Partners, we were self-funding all of our deals. Now that we've proven our model and are managing over \$50,000,000 of our own assets, we are beginning to expand into the private equity space and actively seeking new investors.

What are your hobbies? What do you do in your spare time?

I love spending time with my family, working out, and meditating. We live on Fort Loudon Lake so water sports and boating tend to happen on the weekends.

Learn more about Jake and his businesses at:
www.randpartnersllc.com and www.jakeandgino.com



Mayank Mamtani is a senior biotech research analyst for B. Riley FBR, Inc., a leading investment bank which provides corporate finance, research, and sales and trading to corporate, institutional, and high net worth individual clients.

Mayank began his lengthy career in the healthcare finance sector through internship programs at AstraZeneca & GSK, and venture capital firm called Pittsburgh Life Sciences Greenhouse. Over the next few years, he transitioned upward, accepting roles of increasing responsibility with prominent companies such as SVB Leerink Partners and Amgen. At Amgen, Mayank led execution on numerous corporate development initiatives, including conducting diligence on select M&A, licensing and strategic collaboration ideas directly sponsored by the CEO staff and occasionally delivered to board of directors; most recently, he was responsible for strategic planning and operations for two oncology brands grossing \$1.5B+ in US sales.

Mayank's core competencies are the culmination of practical and academic experience in biology, engineering, and finance. This niche skillset uniquely positions him to responsibly direct capital allocation towards companies that develop treatments for cancer, cardiometabolic disease, and other grievous illnesses. His valued insights are passed onto institutional investors and corporate clients, who also share his passion and commitment towards ultimately advancing medicine.

Mayank states, "My career is a combination of science, finance, and personal interaction. I don't just limit myself to a laboratory or office setting, but always try to supplement my equity research process by consistently engaging with executives, physician scientist and investors dedicated to solving some of the biggest challenges in healthcare. On Wall Street, it is quite rare to find advisors who have had hands-on experience with influencing drug development and commercialization process."

Mayank credits his success to the knowledge he acquired while working across many verticals of healthcare industry, his travels, and to his education. After receiving his master's degree in biotech management from Carnegie Mellon University in Pittsburgh, Mayank moved to New York as a consultant, then to Boston as an investment banker, then to Los Angeles for Amgen and is now based on San Francisco. Add to that, his upbringing in India and the result is a comprehensive and multi-cultural knowledge of both finance and medicine.

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Jaime Manriquez credits his early career experience at IBM with helping him transition into the banking industry and a successful fifteen-year career in a senior position with Santa Cruz County Bank. As a technical support engineer for the global services division at IBM, Jaime was part of the IBM migration team, in charge of converting hardware and software platforms. In that role, he implemented and integrated new software to adhere with existing standards as well as working on numerous Y2K preparation projects.

Jaime transitioned into the banking and financial services industry when he joined Monterey Bay Bank as a senior network administrator and information security officer. In that role, he managed the business network and all network applications as well as all systems conversions and migrations. In 2004, Jaime joined Santa Cruz County Bank, at its founding. He held the role of assistant vice president and information security officer, where he developed, implemented, and managed the Company's information security program. He continued to advance within Santa Cruz County Bank and is currently the senior vice president, chief information officer and chief information security officer for the Bank. In this role, he oversees all aspects of the technology and information systems of the business, including the development and recommendation of technology strategic goals and objectives.

Jaime has a passion and flair for both technology and business and feels fortunate for the opportunity to combine his expertise in his current role with a successful bank.

Jaime holds a Bachelor of Science degree in computer information systems from DeVry Institute of Technology, numerous accredited technical certifications, and is also a graduate of the Western Bankers Association, *Executive Development Program*. He has been featured in *Hispanic Executive* magazine and *Industry Standards* magazine.



Jaime Manriquez, Sr. VP, CIO, CISO
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Will Cyrus is an author, award-winning financial educator, and the founder and CEO of Cyrus Consulting Group, Inc. Based in the Dallas/Fort Worth region of Texas, Cyrus Consulting offers a full suite of financial amenities through a team comprised of top attorneys, accountants, and consultants.

Will began his enviable career in the finance sector after receiving his bachelor's degree in business administration and management from the University of South Florida. His first professional role was as a manager for Sherwin Williams, where he was responsible for team supervision and staff development. After much professional thought, Will was offered a position with Fidelity Investments as an operations associate. One year later, he started his own company with a primary goal of creating personalized financial plans that would facilitate the retirement goals of his clients.

At under thirty years of age, Will has already established himself as a dominant force within the financial market. Despite being featured on *ABC* and *Dallas Voyage Magazine*, he remains humble and attentive to the community. He states, "I am more concerned with people than popularity. Accolades are nice because they are a by-product of hard work, but it doesn't matter if I am not making an impact on society."

When asked what his greatest inspiration is, Will recounts his humble beginnings in a lower-income area of south Florida, Pompano/Deerfield Beach to be exact, where people were not generally concerned with long-term financial planning. "I want to change that, and not just for the blue-collar population, but for everyone" he states. "By promoting financial literacy and awareness, I can make a positive change for the generations to come."

True to his word, Will maintains an active role within the community at present as a mentor at his church in the 180 ministry for fatherless children in Dallas, Texas and as a supporter of several nonprofit organizations. When he has spare time, Will enjoys travel, going to family barbecues, and continually educating himself by reading and studying advances in his field.

IG: Cyrus_Consulting | FB: Will Cyrus | LI: Will Cyrus



Pasquale Zito is an attorney and the founder of The Zito Firm PLLC, a boutique general practice law firm servicing Long Island and New York City.

Pasquale established the firm in 2010 and focuses primarily on real estate law. In addition to his practice, for the past fifteen years, he has managed a successful real estate portfolio that encompasses properties stretching from Long Island to Manhattan.

Pasquale offers personalized service, insightful advice and a solid understanding of the ways market shifts and economic conditions can affect legal interests in real property. Well respected for his intellect and integrity, he attributes his success to hard work, respect, and honesty, values that were instilled in him by his parents.

Pasquale is the son of Italian immigrants who taught him the importance of hard work and ambition. Born and raised on Long Island, he attended the prestigious Chaminade High School in Mineola. He obtained a bachelor's degree in finance from the University of Scranton in 2004 and a Master of Business Administration degree from Long Island, C.W. Post in 2006.

Pasquale also gained invaluable experience as an intern for the Nassau County District Attorney and graduated from Touro Law School in 2009 with his Juris Doctor degree. He has been admitted to the New York Bar Association since 2010.

Pasquale is fluent in both English and Italian, and conversational Spanish, which allows him to work with a diverse clientele. Attentive to altruistic endeavors, he maintains an active profile in the community and supports several nonprofit organizations.

In his spare time, Pasquale enjoys living a healthy lifestyle, watching sports, and spending time with his wife and two young children.



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